Food Purchasing 101

The content of this presentation was the most up-to-date information available at the revision date. However, policies, procedures and guidelines may be updated during an academic year. Please refer to the University Policy website for the most current version of these policies, procedures and guidelines.

Revised 7/08/2016
Learning Outcomes

- Understand the requirements for purchasing food utilizing institutional funds
- Understand what constitutes an employee group meal and how to purchase food for this purpose
- Understand the requirements for conducting an off-campus retreat
- Understand when foundation funds can be used for food purchases
- Understand how to process a payment request for food purchased through DineWest using institutional or foundation funds
- Understand how to process a payment request for food purchased from an outside vendor
Food Purchases with Institutional Funds
Procedural Guidelines

- **USG Business Procedure Manual** – Section 19.7 and 19.8
- **Food Purchases with Institutional Funds** Guideline – UWG Controller Website
  - Food Purchase with Institutional Funds Form
- **Employee Group Meals** Guideline – UWG Controller Website
General Guidelines

• Rules may differ based upon the capacity in which the individual participates in an event
• Funding source for expense should match supported program and participants
• Per diem limits apply to food purchases and is inclusive of applicable tax and gratuity (as per BPM 4.3)
• Alcohol is **NOT** allowed
• Purchase of food with PCARD is not allowed unless specifically allowed in the PCARD policy manual
Food Purchased for Students

• Who are students?
  ➢ Individuals enrolled in classes for credit
  ➢ Individuals enrolled in continuing education classes
  ➢ Individuals recruited as potential students
Examples of Events involving Food Purchases for Students

• Sanctioned student events including recognized student group events, athletic team events and other events open to general student body

• Class where food is an integral part of the institutional methodology

• Events designed to encourage a student to attend the institution

  ➢ Food for athletic recruits are subject to athletic conference rules
Food Purchased for Volunteers

• Who are volunteers?
  ➢ Individuals who provide a benefit to the institution without receiving compensation
Example of Events involving Food Purchases for Volunteers

- Voluntary advisory board meetings
  - Food for volunteer appreciation or recognition is not allowed
Food Purchased for Employees

• Who are employees?
  ➢ Full-time, part-time or temporary faculty, staff and administrators
  ➢ Resident Assistants (RA’s)
  ➢ Student assistants and other student workers
Example of Events involving Food Purchases for Employees

- Safety purposes – water or other hydration products that are needed to prevent serious harm to the employee while at work.
- Academic Programs, Student Events or Educational/Business Meetings that involve predominately non-employees:
  - Attendance by the employee must be required.
  - The meal is an integral part of the meeting.
- Athletic recruiting – the employee’s participation is required.
- Existing contractual or grant agreement.
<table>
<thead>
<tr>
<th>Activity</th>
<th>Allowable Participants</th>
<th>Potential Funding Sources</th>
<th>Notes</th>
</tr>
</thead>
</table>
| Sanctioned Student Events (excluding athletic events) | • Students  
• Volunteers  
• Employees whose participation is required | • Agency Funds  
• Auxiliary Funds  
• Endowment funds where authorized by fund agreement  
• Grants or contract funds as authorized by fund provider  
• Student Activity Fees | • See BPM Sections 19.8.1, 19.8.2, 19.8.3  
• Per Diem limits apply |
| Athletic Events & Recruiting                 | • Students  
• Potential students & parents/guardians  
• Volunteers  
• Employees whose participation is required | • Agency Funds  
• Athletic Auxiliary funds  
• Endowment funds where authorized by fund agreement  
• Student Activity Fees | • See BPM Sections 19.8.1, 19.8.2, 19.8.3  
• Per Diem limits apply  
• Applicable athletic conference rules shall also be followed |
| Classroom & Academic Programs                | • Students  
• Employees whose participation is required | • Sales & Service Revenue  
• State appropriated funds for use only in for credit courses  
• Tuition & Fee Revenue | • See BPM Sections 19.8.1 and 19.8.2 |
| Student Recruiting Events                    | • Students  
• Potential students & parents/guardians  
• Volunteers  
• Employees whose participation is required | • Agency Funds  
• Auxiliary Funds  
• Student Activity Fees | • See BPM Sections 19.8.1, 19.8.2, 19.8.3  
• Per Diem limits apply |
| Volunteer Events                             | • Students  
• Volunteers  
• Employees whose participation is required | • All funds except state appropriated funds and tuition revenue  
• Recognized “Executive” program tuition revenue may be used to purchase food for volunteer events | • See BPM Sections 19.8.2 & 19.8.3  
• Per Diem limits apply  
• Volunteer events with sole purpose of recognition or appreciation for past services may not be paid using any fund source except for Foundation funds. |
| Safety Products                              | • Students  
• Volunteers  
• Employees at risk due to environmental or workplace conditions | • Auxiliary Funds  
• Sales & Service Revenue  
• State appropriated funds  
• Tuition & Fee Revenue  
• Student Activity Fees | • See BPM Sections 19.8.3  
• Expenses should be paid using the departmental budget of the assigned employees |
| Educational or Business Meetings             | • Students  
• Volunteers  
• Employees whose participation is required | • Auxiliary Funds  
• Sales & Service Revenue  
• State appropriated funds | • See BPM Sections 19.8.3  
• Per Diem limits apply  
• Meeting must consist of predominately non-employees |
Employee Group Meals
General Guidelines

• Used when employees are REQUIRED to remain at the work site during mealtime
  ➢ As a convenience to the university and to facilitate effective/efficient operations of the department.
  ➢ Emergency situations
  ➢ Intra-departmental meetings or training sessions
• Meeting should last at least 4 hours
• Approved by departmental approval authority prior to date of event for non-emergency situations
• Alcohol is NOT allowed
• Use of PCARD is not allowed unless specifically addressed in PCARD manual
• Includes meals only; no snacks/beverages
• Per diem limits must be followed inclusive of applicable tax and gratuity
• Group meals held at start and/or finish of meeting are not allowed
Meals Involving Multiple State Institutions

• Occurs when administrators or employees of multiple institutions are required to meet
• Registration fees may be charged to participants of the meeting to support meeting expense
• Registration fees are normally deposited into an agency or departmental sales/service account
• Group meals/Refreshment breaks may be purchased within reasonable cost
• Meals held at conclusion of an event are not allowed
• Alcohol is **NOT** allowed
• Use of PCARD is not allowed unless specifically addressed in PCARD manual
Off-Campus Retreats
Food Purchased for Off-Campus Retreat

• Must present daily itinerary with meeting agenda
• Per diem limits must be adhered to with the first/last day deduction and should include applicable tax and gratuity
• If no overnight lodging, travel must exceed 12 hours and be more than 50 miles from home and campus
  ➢ Less than 50 miles required pre-approval by Dean or VP
• Provide list of participants
  ➢ Student should be identified by name and 917 number
  ➢ Employees should be identified by name and ADP number
Other Considerations for Off-Campus Retreat

• Purpose of event should support the source of funds utilized
• Fund source may impact food purchases and allowable participants
• Contract terms of retreat center must be reviewed and approved by Purchasing Services Contract Manager
• Risk Management should be consulted if activities include any that could present a physical risk to participants
• Travel Authorization required for all employees participating
  ➢ Students can be listed on Student Group Travel Authorization with addendum
Food with Foundation Funds
Food with Foundation Funds

• As in the past, Foundation funds may be utilized for the purchase of food for an institutional event that does not qualify with state-funded sources
• For specific guidelines visit the “Foundation Documents” link on the UWG Foundation webpage
• Examples include:
  ➢ Employees who accompany candidates during a meal
  ➢ Snacks before or during meetings
  ➢ Meals that exceed allowable per diem amounts or do not meet other state funded requirements (i.e. # of meeting hours, distance, etc.)
Food Payments through DineWest
Payment of DineWest Invoices Utilizing Departmental Funds

- Always obtain prior approval from department approval authority prior to incurring expense
- At event conclusion, DineWest Catering will submit Banquet Event Form/Invoice to requesting department for review
- If discrepancies are found, department should contact Dine West Catering for resolution
Payment of DineWest Invoices Utilizing Departmental Funds

• Complete UWG Internal Billing Form and attach final Banquet Event Order/Invoice
  ➢ Ensure UWG Internal Billing Form is signed by approval authority

• Submit additional required documentation on Food Purchases with Institutional Funds Form
  ➢ Purpose of the meeting/event
  ➢ Formal written agenda, flyer, or email that substantiates the event was an official event
  ➢ List of attendees and affiliation
    o Groups of more than 10; indicate approximate number of attendees by participant mix
  ➢ Certification of containment of cost within per diem amounts
Form is found on UWG Controller webpage [www.westga.edu/controller](http://www.westga.edu/controller)

- Click on Forms link
- Food Purchase with Institutional Funds form

### University of West Georgia

**Food Purchase with Institutional Funds**

<table>
<thead>
<tr>
<th>Name</th>
<th>Affiliation/Group</th>
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<tbody>
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<td>9.</td>
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<td>10.</td>
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</tbody>
</table>

**List of attendees & affiliation**

- For groups more than 10, indicate the approximate number of attendees and identify the group.

**Approx. Number in attendance if more than 10:**

**Identification of the Group:**

**Certification of containment of cost within per diem amounts:**

I certify the amount expended did not exceed the authorized per diem amount uniquely identified for the particular meal and no institutional funds were used to purchase alcoholic beverages.

I understand and ensure that the funds spent were only for legitimate public purposes and not for the personal benefit of the employee or other individuals.

I understand the misuse of institutional funds may result in disciplinary actions up to and including termination, as well as, civil action and criminal penalties.

Requested by:

<table>
<thead>
<tr>
<th>Print Name</th>
<th>Signature</th>
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</tbody>
</table>

**Department Manager** (should not be requested):

<table>
<thead>
<tr>
<th>Authorizing Department</th>
<th>Date</th>
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</tbody>
</table>

*Official of the Genera Day*  
Department | Office | Date 2012

*Rev. 12/16/12*
Internal Billing Form Instructions

- Enter the following:
  - Today’s Date
  - Prepared By
  - Original Invoice Date
  - Department Name
  - Original Type and Document ID = DineWest Invoice Number
  - Explanation for Billing = Event Name and Event Date
  - Account/Fund/DeptID/Program/Class = Departmental Expense Chartstring
  - Debit and Credit Amount = Amount of Invoice
  - Credit Amount Chartstring = Credit Chartstring should be the same for all DineWest Invoices
  - Obtain approval signature from department approval authority
  - Submit documentation packet to Controller’s Office
University of West Georgia - Internal Billing Form

This form is to be used to charge departments for services rendered by the reporting department. The monetary amount for the department being charged with the expense should be listed in the “Debit Amount” column; the monetary amount for the department that rendered the service and is recognizing a revenue should be listed in the “Credit Amount” column.

<table>
<thead>
<tr>
<th>Today’s Date:</th>
<th>Prepared By:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Original Billing Date:</td>
<td>Department Name:</td>
</tr>
<tr>
<td>Original Type and Document ID: (attach invoice or other backup for billing)</td>
<td></td>
</tr>
</tbody>
</table>

Explanation for billing:

<table>
<thead>
<tr>
<th>Account</th>
<th>Fund</th>
<th>Dept ID</th>
<th>Program</th>
<th>Class</th>
<th>Project ID</th>
<th>Budget Period</th>
<th>Reference</th>
<th>Debit Amount</th>
<th>Credit Amount</th>
</tr>
</thead>
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<tr>
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<td></td>
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<td>17CATR#####</td>
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</tbody>
</table>

DineWest chartstring should be same for all internal billings

Enter a separate line for each invoice

DineWest Invoice #

Event Name and Date

Departmental expense chartstring (use appropriate expense account)
Payment of DineWest Invoices Utilizing Foundation Funds

• Always obtain prior approval from department approval authority prior to incurring expense
• At event conclusion, DineWest Catering will submit Banquet Event Order/Invoice to requesting department for review
  ➢ Payment of sales tax will be required
• If discrepancies are found, department should contact Dine West Catering for resolution
• Complete UWG Foundation Payment Request Form and attach final Banquet Event Order/Invoice
  ➢ Ensure UWG Foundation Payment Request Form is signed by approval authority
• Submit document packet to UWG Foundation
Form is found on UWG Foundation webpage
www.giving.westga.edu
• UWG Foundation tab
• Foundation Documents link
Payment of Food Invoices to Outside Vendors

- All catering should be contracted with DineWest
- If department has a need to purchase from an outside vendor, approval should be granted by Auxiliary Services prior to contracting services
Payment of Food Invoices to Outside Vendors

• Complete UWG Check Request Form and attach outside vendor invoice

• Submit additional required documentation on Food Purchases with Institutional Funds Form
  ➢ Purpose of the meeting/event
  ➢ Formal written agenda, flyer, or email that substantiates the event was an official event
  ➢ List of attendees and affiliation
    o Groups of more than 10; indicate approximate number of attendees by participant mix
  ➢ Certification of containment of cost within per diem amounts
Questions??

- For further information regarding:
  - Food purchases utilizing department funds
    - Lisa Kunkler, x95329, lkunkler@westga.edu
  - Food purchases utilizing foundation funds
    - Whitney Benefield, x94111, wbenefie@westga.edu
  - Catering invoices or services
    - DineWest Catering, x95982, catering@westga.edu