**FAQ**

**Purchasing Food with OSU Foundation Funds**

In the President’s email concerning food purchases, he primarily addressed meal vouchers for institutional personnel consuming meals of a personal nature. Many questions have been asked about reimbursements for institutional gatherings. Responses to the following requests for clarification have been drafted for presentation to the President:

1. *An area normally schedules two or three office lunches each year, e.g., prior to the holidays, during staff appreciation week, etc.* 
   * *Can Foundation funds be used to reimburse the dean/director for the cost of the office lunch?****The question assumes that everyone involved in the lunches are employees of the University. The answer would be no. President Hargis’ memo was specific: “OSUF funds should not be used for this purpose. In the future, please do not submit meal vouchers for reimbursement unless the meal includes outside personnel (non-University/Agency/inter-agency) and has a bona fide purpose requiring the outside person(s) attendance.  If employees want to share meals and discuss business or other issues, the meal costs should be treated as non-reimbursable personal expenses.”***
   * *If not, can Foundation funds be used to pay the vendor (Student Union, Rancher’s Club, Karsten Creek, Red Rock, McAllisters, etc.) directly for the cost of the lunch?****Who is paid is not germane to the issue. The answer would still be no as cited above.***
2. *An area sponsors a workshop/retreat/welcome or retirement party for faculty/staff/students (all university employees) and the dean/director purchases refreshments/lunches for participants.* 
   * *Can the dean/director be reimbursed from the Foundation for these expenses?****Policy 1-1204 Professional Development/Retreats covers allowable expenses for professional development and retreats involving University personnel. Thus, the policy should be used as guidance.  
       
     If the unit is conducting a workshop which has a registration fee, the cost of refreshment/lunches should be included in the registration fee and printed in the workshop materials. Refreshments and lunches are allowed to be paid from the workshop fee revenue.  
       
     It is assumed that any welcome/retirement party would include the family of the individual and the invitation list would include non-University employees. Thus, reimbursement would be allowed due to the inclusion of “. . .* outside personnel (non-University/Agency/ inter-agency) and has a bona fide purpose requiring the outside person(s) attendance. . .”**
   * *If not, can Foundation funds be used to pay the vendor (see above) directly for the cost of the refreshments?****OSUF funds can only be used for bona fide purposes as discussed above.***
3. *Is this restriction only for reimbursements directly to individuals?*
   * *Can the meal be charged to the vendor, i.e., the Ranchers Club, and then Foundation funds used to cover the expense?   
       
     Again, how payment is made is not the issue. Is the payment authorized is the issue. The President’s guidance is definitive:* ***“OSUF funds should not be used for this purpose. In the future, please do not submit meal vouchers for reimbursement unless the meal includes outside personnel (non-University/Agency/inter-agency) and has a bona fide purpose requiring the outside person(s) attendance.  If employees want to share meals and discuss business or other issues, the meal costs should be treated as non-reimbursable personal expenses.” The guidance is prescriptive whether the reimbursement vouchers are submitted for approval in accordance with OSUF procedures or reimbursement is sought through the Campus Vendor Invoice processes.” Thus, the answer is no.***
4. *Can the VP, Dean or Director be reimbursed for retirement receptions for faculty and staff members including purchase of retirement gift from the college?*
   * ***It is assumed that any welcome/retirement party would include the family of the individual and the invitation list would include non-University employees. Thus, reimbursement would be allowed due to the inclusion of “. . .* outside personnel (non-University/Agency/ inter-agency) and has a bona fide purpose requiring the outside person(s) attendance. . .”**

* **Retirement gifts would also be included. The President included in his communication: “I also urge you to be mindful of the expense of the meal.  We all want to be prudent managers of our institutional funds.” This would also hold true for the expense for the gift.**

1. *Can the VP, Dean or Director be reimbursed for alumni events including alumni receptions at national meetings?*

* ***Yes. Alumni relations are central to the University’s core missions. By definition the Alumni would be “outside personnel” and qualify the event for reimbursement. President Hargis’ memo was specific: “. . . In the future, please do not submit meal vouchers for reimbursement unless the meal includes outside personnel (non-University/Agency/inter-agency) and has a bona fide purpose requiring the outside person(s) attendance. . .* I also urge you to be mindful of the expense of the meal.  We all want to be prudent managers of our institutional funds.*”***

1. *Faculty/staff recruitment – Can reimbursement for meals of faculty/staff hosting candidates designated by a search committee for a bona fide position?*
   * ***It is assumed that any recruitment meal would include the candidate. Thus, reimbursement would be allowed due to the inclusion of “. . .* outside personnel (non-University/Agency/ inter-agency) and has a bona fide purpose requiring the outside person(s) attendance. .” You would also need to be mindful of the expense of the meal.**
2. *Can VPs, Deans, Department Heads and Directors be reimbursed for college/unit holiday luncheons for faculty, staff, and students?*
   * **No. See 1 above.**
3. *Can VPs, Deans, Department Heads and Directors be reimbursed for a Christmas Dinner/Party for administrators?*
   * ***As asked, the answer would be no*. However, at most such events the host invites a significant number of guests who are not university employees, or dependents, for the bona fide purpose of fostering University-Business and/or University-Town relationships. If that is the case the answer would be yes. The event needs to be evaluated within the President’s guidelines: *“. . . please do not submit meal vouchers for reimbursement unless the meal includes outside personnel (non-University/Agency/inter-agency) and has a bona fide purpose requiring the outside person(s) attendance. . .”***
4. *Refreshments for faculty-staff meetings*
   * ***The response depends on the meeting. If a VP, Dean, Department Head has a periodic meeting of faculty or staff for coordinating a semester’s or special project activities/assignments refreshments would be authorized.***
5. *Would VPs/Deans be reimbursed for meals associated with Alumni/Donor cultivation?*
   * ***See 5. above.***
6. *Would VPs/Deans/Directors be reimbursed for meetings with student leadership – pizza provided?*
   * ***If there is a bona fide purpose for the meeting, e.g., a planned meeting with an agenda could be reimbursed, whereas if the VP/Dean/Director ran into the student leadership and purchased their meal, this would not be reimbursable.***
7. *Would VPs/Deans/Directors be reimbursed for meals/reception of guests, faculty, students and staff attending a prestigious award/professional recognition of a faculty, student or staff member of the University?*
   * ***Yes.***
8. *Would the Provost/Provost’s Office, Deans/Deans’ Offices be reimbursed for refreshments and receptions held to recognize faculty who receive promotion and tenure? Would this include guests?*
   * ***Yes.***
9. *Would the Provost/Provost’s Office, VPR/VPR Office, Deans/Deans’ Offices be reimbursed for new faculty luncheons? Regents Professor Luncheons?*
   * ***Yes.***
10. *Often University individuals/units are asked to chair institutional or community events where, given the committee composition and their related commitments/calendars, it is best to provide lunch or refreshments by calling the meeting during the lunch or dinner hour (e.g., United Way Committee, NCAA Peer Review Committee, etc.) to get everyone together in a timely manner. In addition, following a major event such as the United Way Campaign a thank you luncheon and/or reception is held for team chairs. Would the committee chair, chair’s organizational unit be reimbursed for the food/refreshments?*
    * ***Yes.***
11. *Coaches are authorized, per NCAA rules, to provide occasional meals for teams outside of practice. The purpose is to develop camaraderie, team building and present awards throughout the year. NCAA rules limit the meals and the frequency of the meals. Will these meals be eligible for reimbursement from OSUF funds?*
    * ***Yes.***
12. *Will employees be authorized to be reimbursed from foundation funds for civic club memberships and food?*
    * ***No. While employees are encouraged to participate in community service clubs it should be at an individual’s expense.***
13. *The unit will occasionally staff a call center. The students involved work on an hourly basis. The group is provided a meal if they achieve their goals or if it is cost effective to keep them on their phones. Can OSUF funds be used to pay for the meal/ refreshments?*
    * ***Yes, as long as the meals/refreshments are not provided in lieu of compensation.***
14. *The Athletic Department conducts a monthly Lunch and Learn program The purpose of the program is to have community leaders make a presentation to the athletic department. The presentations focus on how the athletic department can better serve the community. Can foundation funds be used to reimburse the cost of the lunch?*
    * ***Yes, if the criteria in 16 above are met.***