

Guidelines
Retreats & Workshops That Involve Food And/Or Beverages
Division of Academic Affairs
Western Kentucky University

Colleges, support units and offices reporting directly to the Provost who are planning retreats and workshops that involve expenditures on food and beverages, must submit requests in accordance with the following policy and guidelines.

Discretionary Spending Policy

The Discretionary Spending Policy ([#3.1103](#)) was established jointly by the Division of Strategy, Operations and Finance and the College Heights Foundation. It states in part *“the appropriate source of funds for certain categories of expenditures and establishes the minimum level of approval required”*. According to the Discretionary Spending Policy, employee meals for organized retreats and workshops may be paid for from university funds (state funds) and/or foundation funds *with prior approval from a President’s Cabinet member or designee*.

Retreats & Workshop Guidelines

Planning:

The following should be considered when planning for retreats and workshops that involve expenditures on food and/or beverages:

- Such retreats and workshops should be scheduled to cover a minimum of 4 hours to a full day. This 4-hour minimum can include the time set aside for the meal that’s provided. For example, a retreat/workshop scheduled for 3 hours with a 1-hour lunch would satisfy the minimum 4-hour requirement. Retreats and workshops scheduled to cover a time frame significantly less than 4 hours would be categorized as working lunch meetings under the Discretionary Spending Policy; funded by foundation funds with prior approval from a President’s Cabinet member or designee.
- Units are encouraged to utilize campus facilities (e.g. Kentucky Museum, Knicely Conference Center, Martens Alumni Center).
- WKU Catering has exclusive rights to serve food and beverages on WKU’s campus. Retreats and workshops held on WKU’s campus must utilize WKU Catering unless an exemption has been approved. (Contact WKU Catering to obtain a Waiver Exemption Form.) Retreats and workshops held off campus may utilize other vendors.
- The cost of meals (per person) should not exceed the amounts indicated below when using state funds. Units may use foundation funds to cover reasonable differences.
 - \$12.00 for Breakfast
 - \$18.00 for Lunch
 - \$23.00 for Dinner

Requesting Approval:

Requests for retreats and workshops that involve expenditures on food and/or beverages should be sent electronically to Jessica Gilland (jessica.gilland@wku.edu) in the Provost's Office from the College Dean's or Support Unit's Office at least one week in advance of the event for approval. Due to the number of retreats and workshops that occur throughout certain times of the year (e.g. summer), requests should be consolidated when possible.

Requests should include the following information:

- Purpose of retreat or workshop
- Date and time
- Location (provide justification when not utilizing a campus venue)
- Source(s) of funding
- Number of attendees (include breakdown of students, faculty, staff, etc. when applicable)
- Estimate for food, room rental, etc.
- Whether alcoholic beverages will be provided
- Waiver Exemption Form (Only needed if event is on campus and WKU Catering isn't being used.)

Requestors will receive an email from the Provost's Office indicating whether the expenditures associated with the retreat or workshop were approved, and the constraints on funding sources (state, foundation).

After-the-Fact Documentation:

The following documents should be attached to receipts for retreats and workshops:

- A list of attendees at the meal or event
- Event invitation or email
- Email of approval from Provost's Office
- Waiver Exemption Form (if applicable)

Revisions:

The Provost's Office will notify the units of any revisions to these guidelines.