What is New?

- Effective 8/1/13, policy change for use of PCard for food, beverage, group meals
- Process change for catering events $2500 and over to comply with state e-Verify requirements
- Revised Food/Group Meal Procurement Grid
- Revised Food/Group Meal Documentation Form
- Updated policies for PCard and food/group meals to comply with State and BOR requirements
Group Meals / Food Policy

BOR Policy: 19.7-19.8 Group Meals/Food and
State of Georgia Travel Policy: 4.7-4.8 Group Meals

GT Policy 5.2.1.9
Conforms with BOR and State Travel policies related to group meals. GT's
policy clarifies use of specific fund types, procurement policies

- Most Foundation-funded meal events and food purchases may be
  processed through the Institute, if donor restrictions are met.

- Allowance for use of Institutional (state) funds in limited circumstances
  for employee business meetings and other Institute events.

- Per diem meal limit restrictions for most events/fund types (exc Fdn)

- Food/Group Meal Event Documentation Form is required to
document compliance
Scope of Policy

This policy does not address the following categories:

- Food purchased for research/academic classroom activities
- Food purchased directly by outside organizations, including GTRC and the GT Foundation
- Meals purchased for, or reimbursed to, employees on travel status, official guests and prospective employees (Refer to GT Travel policies)
Meal Per Diem Limits

- State of GA per diem limits imposed for most state and sponsor funded meals/food
  - $7 breakfast, $9 lunch, $20 dinner (meal + tax)

- Exceptions:
  - Conference/Workshop meals where a registration fee has been charged (funded external to GT)
  - Agency funds
  - Foundation and GTRC funds
  - Sponsored funds, if sponsor specifically authorizes in writing
Revised: Food/Group Meal Event Form

Required to document all food/group meal requests for expenses processed through GT

- P-Card
- Caterer invoice
- AP Payment Request Form
- Emp Payment Request Form
- Petty cash reimbursement

Approval signature is authorized by the departmental approver

Form is not required for transactions processed through the Foundation or GTRC
Sales Tax Issues

- Invoices paid via PCard or through Accounts Payable are exempt from Georgia Sales Tax.

- Invoices paid directly by the Foundation and GTRC are subject to sales tax. Campus administrators must advise caterer if event will be billed to the Institute or the Foundation/GTRC.

- Invoices billed to Agency Fund organizations are subject to sales tax.
<table>
<thead>
<tr>
<th>Form of Payment</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>PCard</td>
<td>Catering/group meals/food in compliance with state policy.</td>
</tr>
<tr>
<td>BuzzMart PO/Invoice</td>
<td>Catering vendor invoices, bottled water/beverage service</td>
</tr>
<tr>
<td>T&amp;E System</td>
<td>Employee reimbursement</td>
</tr>
<tr>
<td>AP Payment Request Form</td>
<td>Catering, food/beverage up to $2500 and reimbursement for non-employees</td>
</tr>
<tr>
<td>Employee Payment Request Form</td>
<td>Optional employee reimbursement method</td>
</tr>
<tr>
<td>GT Foundation Check Request Form</td>
<td>Entertainment, extraordinary development</td>
</tr>
</tbody>
</table>
PCard Policy Changes

- Standard PCard transaction limits reduced to $2499 to comply with State of Georgia e-Verify requirements

- Unallowable on PCard:
  - Bottled water, soda, coffee service, snacks
  - Food/catering expenses that exceed meal per diem limits
  - Employee business meetings that are less than 4 hours long or meals provided at beginning or end of meeting.
  - Entertainment must be processed through the Foundation.
Expense codes

- 751106-Payments to caterers
- 727700-Special Group Meals
- 714350-Food/”Off the Shelf”
  - Retail prepared food, snacks and beverages
  - Recurring beverage delivery, bottled water
- 727130-Reimbursement to non-employee
Catering Policy

- University System of Georgia policies grant exclusive rights to provide food services on campus to Auxiliary Services. Policy details on Student Services web site.

- GT Catering (Sodexho) is the primary on-campus caterer awarded by competitive bid

- Secondary caterers are authorized by competitive bid
Approved GT Caterers

- Additional contracted vendors can operate on campus. Use of other caterers must be approved via exception request form by Bob Junko (Auxiliary Services) for non-contract caterers for events > $200.

- Standard and reasonable service/delivery charges can be paid above the meal per diem limits (separate line item on invoice)

- Rentals of linens and tableware are not calculated as part of the per person meal allowance.
## Approved GT Caterers

**Primary:**  GT Catering (Sodexo)

<table>
<thead>
<tr>
<th>Secondary Catering Services</th>
<th>Phone</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bold American Catering, Michelle Michelman</td>
<td>678.302.3234</td>
</tr>
<tr>
<td>Carlyle’s, Sarah Boyd</td>
<td>404.694.9529</td>
</tr>
<tr>
<td>Proof of the Pudding, Barbara Yontz</td>
<td>404.892.2359</td>
</tr>
<tr>
<td>Rising Roll Gourmet, Alice Barnebee</td>
<td>678.516.7454</td>
</tr>
<tr>
<td>Time to Dine, Michelle Heusner-Wilkinson</td>
<td>770.384.1904</td>
</tr>
<tr>
<td>Highland Bakery, Adriana Taglialavore</td>
<td>404.586.0772</td>
</tr>
</tbody>
</table>
### Approved Caterers-Tech Square

<table>
<thead>
<tr>
<th>Restaurant</th>
<th>Phone</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Technology Square Restaurants</strong></td>
<td></td>
</tr>
<tr>
<td>Barrelhouse Tavern, Tara Christenson</td>
<td>404.723.7011</td>
</tr>
<tr>
<td>Chuck’s Famous, Doug Cleary</td>
<td>404.483.6080</td>
</tr>
<tr>
<td>Also authorized to obtain ethnic foods from restaurants to meet unique cultural needs on campus</td>
<td></td>
</tr>
<tr>
<td>Ray’s/Cedars, Nick Bogoesvski</td>
<td>404.888.9911</td>
</tr>
<tr>
<td>Tin Drum, Stephen Chan</td>
<td>404.845.9898</td>
</tr>
<tr>
<td>Waffle House, Marta Church</td>
<td>770.872.0028</td>
</tr>
<tr>
<td>Georgia Tech Hotel and Conference Center - Limited to Technology Square venues only</td>
<td>404.838.2060</td>
</tr>
</tbody>
</table>
Navigating the Food Policy

1. Identify Activity Category and Participants
   - Business meeting, conference, student event…

2. Know the Funding Source
   - Does funding source allow expenditure?

3. Determine if Per Diem Meal Limits Apply

4. Complete Food/Group Meal Event Documentation Form

5. Place Food/Catering Order, Enter BuzzMart Req (where required)

6. Submit Payment Request or File PCard Receipt
Food/Group Meal Scenarios

Classify the activity category to determine funding options, eligibility of participants, and meal limit restrictions

- Conference?
- Employee Business Meeting?
- Volunteer Event?
- Graduate Student Recruitment Weekend?
- 1-Day Training Class?
- Water/beverages for landscape crew?
Training/Business Meetings for Employees

Meetings and training classes that last 4+ hours and continue through the meal period. Meal can not be at beginning or end of meeting and agenda must be included with documentation.

Funding Source:  
- State Appropriations  
  - Agency Funds (no per diem meal limit)  
  - Sponsored Funds (if allowable)  
  - Foundation/GTRC funds  
  - Student Activity and Auxiliary Funds

Meal per diem limits are imposed ($9 lunch, $20 dinner)

Exception for Foundation-Funded Meetings: Foundation funds can be used for meetings < 4 hours, breakfast and dinner meals and meals can exceed the state per diem limits, however the PCard cannot be used in this case. If meeting purpose is primarily development activity or entertainment, payment should be processed directly through the Foundation.
Business Meeting with Non-Employees

Restaurant meal or catered meal part of educational or business meeting. Hosted by GT employee, most participants are non-employees

Funding Source:
- State appropriated funds
- Auxiliary funds
- Departmental Sales/Service Revenue
- Non-Foundation Sponsored funds (if allowable)
- Foundation or GTRC

- Meal per diem limits are imposed (except for Agency Funds, GTRC, Foundation)

How to Process:
- Process entire payment through GT Accounts Payable.
- Use GT Pcard (if card defaults to allowable funding source)
- Process entire payment through the Foundation/GTRC if meeting agenda indicates that purpose has more of an entertainment focus or for high cost/high profile events.
Conference and Workshops

Participants paid a registration fee to attend conference/workshop. Most are hosted through Professional Education. Predominantly non-USG employee participants. Also used for summer camps and other GT-hosted conferences.

Funding Source:

- Departmental Sales/Service Revenue
- Conference/Workshop fees
- Agency Funds
- Sponsored funds (if allowable)
- Foundation/GTRC funds

- Meal per diem limits are not imposed, if participants paid a registration fee that included meals. If the conference or workshop attendees did not pay a registration fee and institutional funds are used, per diem limits apply.

How to Process:

- Process payment through GT Accounts Payable
- May process directly through Foundation or GTRC if those funds are used and agenda includes entertainment activities
- GT Pcard
Student Events

Events sponsored by recognized student groups and other campus events open to the Georgia Tech student body. This category includes students, parents, volunteers, and employees that are required to participate.

Funding Source:

- Student Activity and Auxiliary Funds
- Agency Funds
- Sponsored Funds (if allowable)
- Foundation/GTRC funds

Meal per diem limits are imposed (except for Agency Funds, Foundation)

How to Process:

- Process entire payment through GT Accounts Payable
  - Use GT Pcard (if card defaults to allowable funding source and expense does not exceed meal per diem limits—regardless of funding source)
Classroom / Academic Programs

Food and drink items required for academic research purposes or classroom academic activities. This does not include food/beverages served to students as meals/refreshments in the classroom.

Funding Source:

- Departmental Sales and Service Revenue
- State Appropriated Funds (for credit courses only)
- Sponsored Funds (if allowable)
- Tuition and Fee Revenue

Meal per diem limits are NOT imposed

How to Process:

- Process entire payment through GT Accounts
- Use GT Pcard (if card defaults to allowable funding source)
**Student Recruiting Events**

Events to support recruitment activity. Includes students, parents, volunteers, and employees that are required to participate.

**Funding Source:**
- Student Activity and Auxiliary Funds
- Agency Funds
- Recognized “executive” program tuition
- Foundation/GTRC funds

Meal per diem limits are imposed (except for Agency Funds, Foundation)

**How to Process:**
- Process entire payment through GT Accounts Payable
- GT Pcard (if card defaults to allowable funding source and expense does not exceed meal per diem limits—regardless of funding source)
Volunteer Events

Advisory boards, mentor programs, etc. Includes students, volunteers, and employees that are required to participate.

Funding Source:

- Student Activity and Auxiliary Funds
- Agency Funds
- Sponsored Funds (if allowable)
- Recognized “executive” program tuition
- Foundation/GTRC funds

Meal per diem limits are imposed (except for Agency Funds, Foundation)

How to Process:

- Process entire payment through GT Accounts
- Use GT Pcard (if card defaults to allowable funding source and expense does not exceed meal per diem limits—regardless of funding source)
Safety Products

Includes water and hydration products and other products required by OSHA. For students, employees, volunteers and employees at risk due to environmental/workplace conditions.

Funding Source:
- Student Activity and Auxiliary Funds
- Agency Funds
- State Appropriations
- Tuition and Fee Revenue

Not restricted by meal per diem limits, as products do not represent a meal.

How to Process:
- Process entire payment through GT Accounts Payable
- GT Pcard (if card defaults to allowable funding source)
Snacks/Refreshments

Monthly coffee service, bottled water, snacks available for students, participants, volunteers, visitors, faculty/staff meetings, etc.

Funding Source:
- Foundation/GTRC funds that are not restricted by donor

How to Process:
- Process payment to vendor through Accounts Payable or request reimbursement through T&E (employees) or AP Payment Request Form (non-employees)
Entertainment

Entertainment and Development Activities, including holiday parties, retirement receptions, sporting event receptions, end-of-year picnics, and alumni entertainment. Local restaurant meals are generally classified as entertainment unless a business meeting, with agenda, exists. All party supplies and paper products associated with entertainment activities must also be processed through the Foundation or GTRC.

- Funding Source:
  - Foundation/GTRC funds

- How to Process:
  - Process entire payment through
    - Foundation or GTRC
Alcoholic Beverages

- Alcohol for consumption may not be purchased with the P-Card or processed through the Institute using Institutional funds.

- Alcohol purchases using Foundation or GTRC funds must be processed directly through the Foundation or GTRC.

- Alcohol purchases using sponsored accounts must be approved and specified in writing by the sponsor.

- Exception is allowed for conferences where a registration fee is designated for receptions, including costs associated with bartending services. Alcohol can never be charged to the PCard.
  - Professional Ed or Other GT-Sponsored conferences for external participants
  - Executive Masters programs
Resources

- Questions Regarding GT Catering Policy
  - http://studentcenter.gatech.edu/catering/Pages/default.aspx
  - Bob Junko, Assc Director, Student Center Business Operations

- Questions Regarding Food / Group Meal Policy
  - Ap.ask@business.gatech.edu
  - Sharon Jackson, Director of Accounts Payable and Travel
  - Policy and Forms available on Business Services web site: http://www.procurement.gatech.edu/