PCPS POLICY 7
Hospitality Policy

Category: Procurement, Contracting & Payment Services
Title: Hospitality Policy
Responsible Unit: Procurement, Contracting & Payment Services
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PROCUREMENT, CONTRACTING & PAYMENT SERVICES POLICY 7
HOSPITALITY POLICY

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1. PURPOSE & SCOPE:

1.1 ***Purpose***. In the conduct of day-to-day business, West Virginia University ("University" or "WVU"), the West Virginia University Research Corporation ("WVURC"), and the West Virginia University Innovation Corporation ("WVUIC") may incur reasonable meal or other hospitality expenses for its employees, students, or guests. The purpose of this Policy is to outline the proper use of WVU, WVURC, funds for meal and hospitality expenses.

1.2 ***Scope***. This Policy applies to all employees of WVU, WVURC, WVUIC, and WVU Affiliates when using WVU, WVURC, and WVUIC funds for meal and hospitality expenses. This does not apply to meals and hospitality expenses when using WVU Foundation funds; however, the WVU PCard can not be used for any expenses deemed unallowable in this policy regardless of whether the WVU Foundation will be reimbursing WVU for the expense. For those specific situations, a WVU Foundation card must be used to cover the expense, or the invoice must be submitted directly to the WVU Foundation to process.

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2. MEAL AND HOSPITALITY EXPENSES:

2.1 **Allowable Expenses.** The following expenses are considered allowable:

2.1.1 **Business Meals**. Light refreshments and meals with external parties (i.e., business associates, vendors, consultants) when such meals are in the interests of the University. This also includes conferences, workshops, seminars, and other similar functions hosted by the University.

2.1.2 **Courtesy Refreshments.** Light refreshments for visitors of the University.

2.1.3 **Employee Recognition/Appreciation Functions.** Light refreshments and meals for functions honoring faculty, staff, or student recipients of awards, milestones, or other appreciation. Note: the WV Ethics Act must be followed for any employee recognition expenses. See Public Employee Recognition Events.

2.1.4 **Employee training and development.** Light refreshments and meals during planned employee training and development events involving multiple employees. The duration of the training must be longer than two hours. This also includes formal staff retreats. These events should be restricted, must be budgeted for, and require Dean/VP approval.

2.1.5 **Patients and Research Subjects.** Light refreshments provided to patients, participants, and their caregivers involved in University-related research as deemed necessary.

2.1.6 **Recruiting Meals**. Light refreshments and meals for prospective faculty, staff or students, and their spouses/partners and children when the meals are a necessary, customary, or expected part of a recruiting process.

2.1.7 **University-hosted events.** Light refreshments and meals during recognized university-sponsored seminars, workshops, conferences, other similar functions where outside guests are included.

2.1.8 **Student Meals.** Light refreshments and meals for students representing the University or participating in official student activities.

2.1.9 **Working Meals.** Occasional, non-routine, modest refreshments and meals consumed during working hours, where all attendees are employees, may be permitted under exceptional circumstances. These instances should be infrequent, must be pre-approved by the Dean or Vice President, and must be included in the departmental budget.

2.1.9.1 When the meal is funded by WVU, one of the following must be met:

2.1.9.1.1 The meal is necessitated by emergency operational requirements.

2.1.9.1.2 The meeting time is longer than two hours, encompasses a regular meal time, and could not otherwise be scheduled during regular working hours.

2.1.9.2 The food should be served on campus rather than at a dining establishment.

2.1.9.3 When the meal is funded by the WVURC overhead or WVUIC, one of the following must be met:

2.1.9.3.1 The meal enhances or extends the quality of the work, facilitates a business meeting, or is necessitated by workload or scheduling conflicts.

2.1.9.3.2 The meeting time encompasses a regular meal time and could not otherwise be scheduled during regular working hours.

2.2 **Unallowable Expenses.** The following are examples of expenses that are not permissible:

2.2.1 Any hospitality expenses paid using grant funds unless specifically allowed in writing by the funding agency and confirmed by the Sponsored Research Accounting Office if not in the originally approved budget.

2.2.2 Departmental staff meetings and standing internal committee meetings between University employees.

2.2.3 Meal expenses not permitted by the WVU/WVURC Travel Manual.

2.2.4 Meals with new employees or employees leaving the University (i.e. new hires/exit interviews).

2.2.5 Employee only social gatherings, such as:

2.2.5.1 Anniversaries

2.2.5.2 Birthday parties

2.2.5.3 Holiday parties

2.2.5.4 Promotion parties

2.2.5.5 Retirement parties

2.2.6 When the meal or event is paid with WVURC overhead funds, exceptions are permitted if approved by the Vice President for Research or his/her designee.

2.2.7 The examples listed above are not an all-inclusive list. If you have any questions regarding whether an event or item(s) are allowable, please contact Procurement, Contracting and Payment Services (PCPS) prior to the event at: pcps@mail.wvu.edu.

2.3 **Hospitality while on travel.** Hospitality expenses while on travel are permitted, but shall be limited to the following:

2.3.1 Fundraising/promotional/development meetings or events on behalf of WVU, WVURC or WVUIC as required as part of the employee's job duties.

2.3.2 Any hospitality meal provided to a University employee while on travel status must be deducted from the amount allotted for that meal per diem requests (using the GSA meals and incidentals breakdown) and must include required documentation. Excess per diem allowances received are considered taxable income to the employee and possibly a violation of the WV State Ethics Act.

2.3.3 Meals involving only employees of WVU, WVURC, WVUIC, and WVU Affiliates when using WVU, WVURC, or WVUIC funds are not permissible. Meals with colleagues are not considered hospitality while on travel even if general business was discussed and are not permissible. Allowable hospitality while on travel is limited to activities required as part of the employee's job duties as outlined above.

2.4 **Documentation Required.** Hospitality expenses must include the following supporting information through the available notes fields in Mountaineer Marketplace or MyExpenses:

2.4.1 Detailed business purpose for the event.

2.4.2 Original itemized invoice or original itemized receipt.

2.4.3 Attendee names and relationship to WVU, WVURC, or WVUIC, including providing the following information:

2.4.3.1 Groups of 20 or less: list of attendees and their relationship to WVU/WVURC.

2.4.3.2 Groups larger than 20: the group's relationship to WVU or WVURC

2.4.3.3 Regardless of the number of attendees, attendee names must be included for all personal guests of employees (i.e. spouse/partner, children).

2.5 **Other Requirements or Information.**

2.5.1 For guidance on employee recognition and retirement events/gifts, please refer to the WV Ethics Commission: https://ethics.wv.gov, and Recognition and Retirement guidance. Or contact WVU's General Counsel's Office directly.

2.5.2 Any WVU Tax Services' policies on Gifts and Miscellaneous Benefits Policy and the University Provided Meals Policy must also be followed.

2.5.3 In addition to following this policy, employees must also follow the current University Spending Guidelines to determine what additional approvals may be required for hospitality expenses.

2.5.4 In addition to Section 2.2.1 requirements for use of grant funds for hospitality expenses, employees must comply with any grantor requirements for establishing an event policy or code-of-conduct promoting a safe and harassment-free environment. More information can be found at the WVU Responsible Conduct of Research Office at https://rcr.wvu.edu/.

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3. DEFINITIONS:

3.1 "Hospitality" means food, non-alcoholic beverages, facility rental, entertainment, and other related expenses for the reception of guests for a specific event or function relating to conducting University business.

3.2 "WVU Affiliate" means any West Virginia University Research Corporation subsidiaries, West Virginia University Hospital System or any of its subsidiaries or affiliates, West Virginia University Foundation, West Virginia University Alumni Association, and other entities created by West Virginia University to serve the institution's mission.

4. ENFORCEMENT & INTERPRETATION:

4.1 All employees are charged with providing full support to this policy. It is the responsibility of the AVP/Dean or designee to implement this policy within their Unit.

4.2 Responsibility for interpretation of this Policy rests with Procurement, Contracting & Payment Services.

4.3 Any exception to this policy must be obtained by the AVP of Procurement, Contracting & Payment Services or his/her designee before the expense is incurred.

5. AUTHORITY & REFERENCES:

5.1 W. Va. Code §§ 6B-1-1 *et seq*. and W. Va. Code §18B-5-9.

6. CROSS REFERENCES:

6.1 Relevant institutional policies and procedures include, but are not limited to:

6.1.1 WVU Procurement Card Program
6.1.2 Travel Policy
6.1.3 WVU/WVURC PCard Manual
6.1.4 WVU/WVURC Travel Manual