

LAKE STEVENS SCHOOL DISTRICT
CATERING, MEALS AND LIGHT REFRESHMENTS REQUEST
Must be completed and approved PRIOR to any District commitment

FORM A

Requestor Information:

Name: _____ Phone Number: _____

Building/Department/Group: _____

Event Information:

Name of event: _____ Date: _____

Location: _____ Time (start/end): _____

Purpose of Event: *attach a copy of notice, calendar invite, flyer or agenda*

Participants: *mark all that apply*

- | | |
|---|---|
| ☐ Community (public event) | ☐ Approved |
| ☐ District Officials | ☐ Volunteers Students |
| ☐ District Employees | ☐ Other (district affiliation) _____ |

Benefit of Providing Food: *Meals or light refreshments may be provided when they contribute to the effectiveness of the event (integral part). Meals may be provided for events that occur during normal meal hours and it's not convenient for participants to make individual arrangements to eat.*

Items to Be Served: *mark all that apply*

Light refreshments: ☐ Snacks ☐ Beverages

Meals*: ☐ Breakfast ☐ Lunch ☐ Dinner

If using District Catering, has the request been made?

Yes ☐ No ☐ N/A ☐

Event cost:

Number of Participants: _____

Selected Vendor(s): _____

Method(s) of payment: _____

Total Estimated Cost: _____

Estimated Cost per person _____

**If meals are provided, provide the names of the individuals served meals.*

Authorization

Account Code(s): _____ PO: _____

Administrator (please print)

Signature

Date

SUBMIT APPROVED FORM & ORIGINAL ITEMIZED RECEIPTS TO BUSINESS SERVICES **OR** SUBMIT APPROVED FORM & CATERING REQUEST AGREEMENT TO FOOD & NUTRITION SERVICES. IF APPLICABLE, SUBMIT THE LIST OF NAMES FOR MEALS SERVED TO BUSINESS SERVICES.

MEALS	LIGHT REFRESHMENTS
DEFINITION	
Items like sandwich trays, pizza, salad, potato or taco bars	- Non-alcoholic beverages: Items like tea, coffee, soft drinks, juice, bottled water, milk - Snacks: Items like doughnuts, cookies, sweet rolls, fruit or cheese
REQUIRED CRITERIA	
✓ Special situation or occasion ✓ Legitimate District business conducted ✓ Participants are away from their regular workspace ✓ Participants have a District affiliation ✓ Integral part of the event ✓ Cost is reasonable for the number of participants ✓ Event occurs during normal meal hours ✓ It's not convenient to make individual arrangements to eat	✓ Special situation or occasion ✓ Legitimate District business conducted ✓ Participants are away from their regular workspace ✓ Participants have a District affiliation ✓ Integral part of the event ✓ Cost is reasonable for the number of participants
REQUIRED DOCUMENTATION	
✓ Prior approval ✓ Purpose of the District event ✓ Number of participants ✓ District benefit derived from serving meals ✓ Original itemized receipts or Catering Request Agreement for the actual cost ✓ Names of individuals provided meals	✓ Prior approval ✓ Purpose of the District event ✓ Number of participants ✓ District benefit derived from serving light refreshments ✓ Original itemized receipts or Catering Request Agreement for the actual cost ✓ Name of Building/Department/Group provided light refreshments
ALLOWABLE EXAMPLES:	
✓ Non-routine District meetings/trainings/events ✓ Meals for authorized volunteers providing hearing/screening services during lunch ✓ Meetings with external constituents (advisory boards) ✓ Approved District retreats ✓ Search committee members when interviewing candidates ✓ Off-campus meetings an employee is required to attend in an official District capacity ✓ De Minimis (< \$50/year/person) staff appreciation with MOU funds ✓ Events where fees are collected to cover costs	✓ District meetings/trainings/events ✓ Monthly staff meetings ✓ Meetings with external constituents (advisory boards) ✓ Approved District retreats ✓ Search committee members when interviewing candidates ✓ School Board meetings ✓ Snacks for students in before/after school extended learning activities ✓ Events showcasing student work (Curriculum Night, Open House)
UNALLOWABLE EXAMPLES:	
- X Normal daily business or casual conversations - X Social events or receptions - X Building/Department level or individual celebrations - X Meals that interfere with the National School Lunch Program - X Elections or lobbying - X Individual birthdays, anniversaries, retirements or memorial services - X Alcoholic beverages - X Meals with vendors <u>Caution:</u> Meals at local restaurants with only District personnel = taxable income	- X Normal daily business or casual conversations - X Social events or receptions - X Building/Department level or individual celebrations - X Light refreshments that interfere with the National School Lunch Program - X Elections or lobbying - X Individual birthdays, anniversaries, retirements or memorial services - X Alcoholic beverages

CATERING, MEALS AND LIGHT REFRESHMENTS GUIDANCE

This does not apply to:

- Food purchased as nominal incentives/rewards (*candy, gum, etc.*) for morale or participation
- Food purchased for resale (Cove, Food & Nutrition Services)
- Food used as part of the curriculum (science project, Life Skills class)
- Food purchased for students at approved ASB activities – ASB approval & event info support expenditure
- Meals obtained in travel status
- Food purchased with personal funds

Overview

The purchase of meals and light refreshments must satisfy legal requirements to avoid gift of public funds, conflicts of interest or personal taxable income.

Employees, students and others associated with the District are expected to pay for their own food and beverages. However, for special situations or occasions, the District may purchase meals and light refreshments for employees, students and others while conducting official District business.

The purchase of meals and light refreshments for public ceremonies, working meetings, trainings, events and/or dedications are permitted provided they are authorized and benefit the District.

The cost of meals and light refreshments must be reasonable and appropriate for the number of participants. The District's catering program may be used as a cost effective option.

To avoid ethics violations, meals may not be accepted from vendors nor provided to vendors. This includes any current or potential supplier of goods and services.

Caution: Other requirements may be more or less restrictive where meals and light refreshments are authorized, such as MOU, Associated Student Body or grant funds.

Meals and Light Refreshments

Meals include items like sandwich trays, pizza and salad, potato or taco bars.

Light refreshments include non-alcoholic beverages like tea, coffee, soft drinks, juice, bottled water, milk and snacks include items like doughnuts, cookies, sweet rolls, fruit or cheese.

Meals may be provided when they contribute to the effectiveness of the event that occurs during normal meal hours and it's not convenient for participants to make individual arrangements to eat. For example, a speaker or business discussion through the lunch/dinner period.

Light refreshments may be provided when they contribute to the effectiveness of the event.

Meals and light refreshments may be provided when all or most of the participants are away from their regular workspace. The District event may be held in a District conference room, the ESD, a hotel conference room or a restaurant.

Caution: If meals are served with a meeting at a local restaurant and all the participants are from the District, where there is no overnight travel, the IRS would consider this taxable income. Thus, any District expenditure would be taxed as employee compensation.

Allowable Business Meeting with Meal	
IRS Taxable Income	Not IRS Taxable Income
• Off site (in a restaurant) • No overnight travel • Includes only District employees	• On-site (District building) • Includes overnight travel • Includes non-District employees

Authorization and Documentation

Proper authorization and supporting documentation are required for all District expenditures regardless of the method of payment – PO, catering, p-card, imprest funds, reimbursement, etc.

The required supporting documentation for meals and light refreshments include:

• Prior approval	Catering, Meals, and Light Refreshments Request (3600F-1)
• Purpose of the District event	
• Number of participants	
• District benefit derived from serving meals or light refreshments	
• <i>If applicable</i> , name of Building/Department/Group provided light refreshments	Sign-in Sheet (3600F-2) <i>optional</i>
• <i>If applicable</i> , names of individuals provided meals	
• Original itemized receipts <u>or</u> Catering Request Agreement for the actual costs	

Steps:

- 1 Catering, Meals and Light Refreshments Request Form is completed and approved PRIOR to any District commitment
- 2 Follow normal purchase procedures
- 3 Prepare a list of any individuals provided meals or use Sign-in Sheet
- 4 Obtain original itemized receipts for the actual cost
- 5 After the event, submit the following items to Business Services:
 - Approved Catering, Meals and Light Refreshments Request Form
 - Names of any individuals provided meals
 - Original itemized receipts

When using District Catering:

- 1 Catering, Meals and Light Refreshments Request Form is completed and approved PRIOR to any District commitment
- 2 Submit the approved Catering, Meals and Light Refreshments Request Form and the Catering Request Agreement to Food & Nutrition Services
- 3 Prepare a list of any individuals provided meals or use Sign-in Sheet
- 4 After the event, Food & Nutrition Services will send forms to Business Services for internal catering charges
- 5 After the event, submit the names of any individuals provided meals to Business Services

SIGN-IN SHEET

You may also use an alternative attendees list.

FORM C

Name of the event:	Date:
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Count	Print Name	District Affiliation
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