

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

Colleges, major areas and offices reporting directly to the Provost who are planning for retreats and workshops that involve expenditures on food and beverages, should 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 WKU 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 from university funds (state funds) and/or WKU Foundation funds *with prior approval from an Administrative Council 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 WKU Foundation funds with prior approval from an Administrative Council member or designee.
- Units are encouraged to utilize campus facilities (e.g. Kentucky Museum, Knicely Conference Center, Martens Alumni Center).
- As suggested by the CFO’s Office, the cost of meals (per person) should not exceed the amounts indicated below when using state funds. Units may use WKU Foundation funds to cover reasonable differences.
  - \$12.00 for Breakfast
  - \$15.00 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](mailto:jessica.gilland@wku.edu)) in the Provost's Office from the College Dean's or Major Area'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

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

*Revisions:*

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