

## UGA HOUSING FOUNDATION ACCOUNT PURCHASE REQUEST

**Section:** Business Operations

**Policy:** University Housing complies with the [University of Georgia Foundation expenditure policies](#) and UGA's [Recognition Awards for Employees and Non-Employees policy](#)

**Purpose:** This policy provides guidelines for University Housing staff seeking approval to use foundation funds for an event.

**Scope:** This policy applies to all University Housing staff planning to seek payment or reimbursement from the UGA Housing Foundation account.

**Procedure:**

1. The executive director will set the budgets for the University Housing Foundation account each fiscal year and share with staff responsible for overseeing the budget by July 1.
2. A staff member seeking to use foundation funds should:
  - a. Contact the Housing Business and Human Resources office (HBHR) to see if foundation funds are the appropriate source for proposed purchase, and if the purchase would be tax exempt.
  - b. Submit a request and reasonable estimate for the expenditure to their supervisor via email. If approved at the supervisor level, the proposal should be forwarded via email through the supervisory chain to the director level for approval prior to purchase.
  - c. If a proposal is approved at the director level, the director will forward the proposal to the executive director. Once the request is approved by the executive director, the staff member may proceed.
    - i. If the purchase will include recognition awards:
      1. (Note: There is an annual *de minimis* limit of \$75 per person per year).
      2. Pre-approval from the Office of the Vice President for Student Affairs (OVPSA) is required for recognition and awards programs.
      3. Prior to event: Complete the [UGA Recognition and Awards Program form](#)
        - a. Submit completed form to HSG-business@uga.edu, associate director and fiscal affairs manager
        - b. HBHR will obtain OVPSA signature via DocuSign and route back to purchase initiator to include with purchase when processing payment
    - ii. If the purchase will include meals and/or entertainment:
      1. OVPSA pre-approval is required for entertainment of employees (e.g., food for the end-of-the-semester celebration).
      2. Prior to event: Complete the [UGA Request for Authorization to Provide On-Campus Group Meals form](#) to request approval

- a. Submit to HSG-business@uga.edu, associate director and fiscal affairs manager.
  - b. HBHR will obtain OVPSA signature via DocuSign and route back to purchase initiator of approval to include with purchase when processing payment.
  - d. The requestor will submit email documentation showing the levels of approval with request for payment/reimbursement as outlined in Procedure 4 below.
- 3. Staff recruiting—candidate and host meal reimbursements
  - a. Candidates interviewing for positions in the department are escorted to scheduled meals by department employees (hosts). The meal is funded by the University Housing Foundation account.
  - b. The current department limits are: up to \$13 for breakfast per person, \$14 for lunch per person and \$23 for dinner per person. These limits include any applicable tax and tips and are subject to change. Updates to the meal limits are maintained by the executive director.
  - c. Only one host per candidate meal will be reimbursed.
  - d. Hosts should pay for the meal(s) and obtain an itemized receipt(s). Then the host will process a reimbursement in OneSource, using the Accounting Tag (SpeedType) HSGFOUND, ensuring all information referenced in procedure 4 is attached.
- 4. Request for payment to a vendor or reimbursement to a staff member should be processed through the HBHR purchasing specialist. Staff will complete, compile and submit the following:
  - a. HBHR PAW form (available from the HBHR purchasing specialist)
  - b. Email documentation approving expenditure per Procedure 2
  - c. Itemized receipt (please contact the Housing Business office to see if the purchase is tax exempt)
  - d. Detailed agenda or flyer

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