Chemistry Department Meal Reimbursement Policies

All reimbursements for meals are subject to the following in-state per person maximums:

Breakfast $8
Lunch $9
Dinner $17

If state limits are exceeded, UW Foundation funds may be used up to a total of $75 per person.

Example: Dinner per person cost = $80.

State limit	$17
UW Found	$58
Total Reimb.	$75
Unallowable	$5

More restrictive spending limits may be placed on UW Foundation by the Divisions or by the Department. See specifics below.

Term Clarification

For the purposes of this document, the following terms will be used as follows:

UW Foundation: Gift funds managed by UW Foundation. These funds are used at the discretion of the Department.

Division
UW Foundation: Gift funds managed by UW Foundation. These funds are used at the discretion of a specific Division and/or PI.

All reimbursement must be submitted through E-Reimbursement

Visiting Speakers for Division Seminars:

The department provides each division with seminar budgets.

For 2009-2010, the budgets are as follows:

Analytical   7,000
Physical   16,000
Inorganic   12,000
Organic   16,000
Materials   5,000

Per Person Spending Limits:

- These funds are subject to state limits for meals.

- Meal that exceeds state limits may be funded by Division UW Foundations funds up to $75 per person. Divisions may set UW Foundation limits that are more restrictive.

Event Spending Limits: $100

- Any number of attendees are allowed as long as the event budget is not exceeded and the per person limit is not exceeded.

Notes:

- If the speaker brings a partner, UWF will reimburse meal expenses for the partner and an additional partner. This could add up to $100 to the event budget.

- Faculty or staff may attend if there is a valid business purpose.

Visiting Speakers for Division Seminars Examples:

Example 1:   1 speaker and 2 staff attend dinner
               Total event cost is $135, $45/ person

               $135-100 = $35 unallowable, $33.33/ person allowable

               State limit $17   * 3 = $51.00
               UW Found $16.33   * 3 = $49.00 (33.33-17)
               Total Reimb $33.33 * 3 = $100.00
               Unallowable $11.67 * 3 = $35.00

Example 2:   1 speaker and 1 staff, speaker and staff partners attend dinner
               Total event cost is $200, $50/ person

               $100 over budget is approved based on partner policy

               State limit $17   * 4 = $68.00
               UW Found $33   * 4 = $132.00   (50-17)
               Total Reimb $33.33 * 3 = $200.00
               Unallowable $11.67 * 3 =   0.00

Example 3   1 speaker and 2 staff attend dinner
               Total event cost is $100, $33.33/ person

               Division rule is to reimburse $34 from seminar
               budget. Divisional coordinator submits the following to Reba:

               Please reimburse $34 from seminar budget 233GUXX. Balance
       should be charged to Division UWF discretionary fund 1222XXX.

               State limit $17   * 2   = $34.00
               Div UW Fnd $17*1 + 16.33*3   = $66.00 **
               Total Reimb $33.33 * 3   = $100.00
               Unallowable $0   =   0.00

               ** 17 for 3rd attendee plus 33.33-17 for all three

UWF Named Lectureships

The following are Department or University Named Lectureships:

Bernstein, Richard B. Lectureship
Ferry Lectureship
Hirschfelder, Joseph Visitor Fund
Hirschmann, Ralph Lectureship
Meloche lectureship
Shain, Irving Colloquium
Willard, John E. Lectureship
Sprague Lecture Series
Folkers Lectureship
Chuck and Martha Casey Lectureship

Spending Limits:

- These funds are subject to state limits for meals.

- Meal that exceeds state limits may be funded by Lectureship Foundation or UW Trust funds up to $75 per person.

Event Spending Limits: Determined by available funds

- Any number of attendees are allowed as long as the event budget is not exceeded and the per person limit is not exceeded.

Notes:

- If the speaker brings a partner, UWF will reimburse meal expenses for the partner and an additional partner.

- faculty or staff may be if there is a valid business purpose.

- Donors may attend the meal.

UWF Named Lectureships Examples:

Example 1:   1 speaker and 2 staff, 2 partners, 1 donor attend dinner
              Total event cost is $510, $85/ person

              6@ $75 = $450
              $510-$450 = $60 unallowable

              State limit $17   * 6 = $102.00
              UW Found $58   * 6 = $348.00
              Total Reimb $75   * 6 = $450.00
              Unallowable $10   * 6 = $60.00

Example 2:   1 speaker and 2 staff, 2 partners, 1 daughter attend dinner
              Total event cost is $510, $85/ person

              6@ $75 = $450
              $510-$450 = $60 unallowable
              Daughter has no business purpose so not allowable
              $450-$75 = $375

              State limit $17   * 5 = $102.00
              UW Found $58   * 5 = $348.00
              Total Reimb $75   * 5 = $375.00
              Unallowable $10   * 6 = $135.00

Faculty Candidates:

<u>First Faculty visit</u>
The department will cover costs for a first faculty visit meals.

Spending Limits:

- These funds are subject to state limits for meals.

- Meal that exceeds state limits will be funded by Department UW Foundations funds up to $50 per person.

Event Spending Limits: $200

- Any number of attendees are allowed as long as the event budget is not exceeded and the per person limit is not exceeded.

Notes:

- Faculty or staff may attend meal if there is a valid business purpose.

<u>Second Faculty visit</u>
The department will cover costs for a second faculty visit meals.

Spending Limits:

- These funds are subject to state limits for meals.

- Meal that exceeds state limits will be funded by Department UW Foundations funds up to $75 per person.

Event Spending Limits: $300

- Any number of attendees are allowed as long as the event budget is not exceeded and the per person limit is not exceeded.

Notes:

- If the faculty candidate brings a partner, UWF will reimburse meal expenses for the partner and an additional partner.

- Faculty or staff may attend if there is a valid business purpose.

Faculty Candidate Examples:

Example 1:   First Faculty visit. 1 candidate, 1 candidate spouse, 1 host spouse, 2 additional faculty.   As the coordinator or host, you've noted a division discretionary fund to cover the expenses beyond the budget event.

> Total event cost is $375, $75/ person
> Event budget is $200
>
> $375-$200 = $175 not covered by Department
> No spouses covered for first visits so:
> $200/4 attendees - $50/person

State limit	$17	* 4 =	$ 68.00
UW Found	$33	* 4 =	$132.00
Total Reimb	$50	* 4 =	$200.00
Unallowable	$50	* 2 =	$100.00
Non Department Funds	$75	=	$75.00

Example 2:   Second Faculty visit. 1 candidate, 1 candidate spouse, 1 host spouse, 2 additional faculty.   As the coordinator or host, you've noted a division discretionary fund to cover the expenses beyond the budget event.

> Total event cost is $375, $75/ person
> Event budget is $300
>
> $375-$300 = $75 not covered by Department but
> spouses covered for second visits so:
> $400/6 attendees - $66.67/person

State limit	$17	* 6 =	$ 68.00
UW Found	$49.66	* 6 =	$132.00
Total Reimb	$75	* 6 =	$375.00
Unallowable	$0	=	$0.00
Non Department Funds	$0	=	$0.00

Chemistry Reimbursement Policy for Non Meal Expenses

UWF Funded Lecturers (such as Ferry, Folker, Hirschmann, Meloche etc..):

The complete terms of the agreement between the lecturer and the Department of Chemistry must be noted in the welcome letter that is sent prior to the lecturer incurring any expenses. Honorarium amounts, travel and lodging guidelines as well as any special accommodations need to be noted up front.

Lecturer Honorariums must be paid from the department named lectureship fund (233 account).

Lecturer Travel and Lodging must be paid from the department named lectureship fund (233 account) and meet the state limits. Airfare must be coach. Rental cars must be midsize. Hotel must not exceed $70 per night rate.

Faculty Candidates

First Visit

Faculty Travel and Lodging must be paid from the department …

Second Visit

Faculty Travel and Lodging must be paid from the department …

Graduate Candidates:

A letter of invitation noting University guidelines for expense reimbursements must be sent to all graduate students who will be attending Chemistry's recruiting weekend. Travel and Lodging state limits and policies must be included.

Graduate candidate Travel and Lodging must be paid from the department named lectureship fund (233 account) and meet the state limits. Airfare must be coach. Rental cars must be midsize. Hotel must not exceed $70 per night rate.