

8.30.010-P District Funds for Purchase of ~~Gifts~~, Meals, ~~and~~ Refreshments and Gifts

Portland Public Schools receives funds from a variety of sources. It is the responsibility of the District to steward those scarce resources carefully and in the best interests of students. District funds generally may not be used for meals or gifts for employees. Nonetheless, there may be occasions when it is appropriate for Board members, administrators, and others to expend District funds ~~in the course of while~~ conducting District business to provide meals or refreshments. The purchase of gifts may also be appropriate in certain situations, as both are outlined below.

District employees are expected to exercise prudent and appropriate judgement in the expenditure of District funds for meals and/or refreshments.

“District funds” as used in this policy, refers to any of the general accounts of the District. This includes the General Fund, Bond Fund, Grants, and others accounts. It also includes money in student body accounts held at each school that are derived from student activities or from parent organizations is money to be used only for students and student activities.—

Donations from PTAs, local businesses, individual made directly to schools are also not considered “District funds.”

Funds not generated by the District (e.g., a “social fund” or “sunshine fund”) voluntarily collected from staff members or others ~~or others~~ for the specific purpose of providing gifts or parties, such as— birthday recognition, bereavement and illness acknowledgement, etc.,—are exempt from the following requirements.

Required documentation and business justification for food and beverage purchases shall be specified in the Administrative Directive [xxx] [insert link].

1) Meals and Refreshments

In order to support an efficient, effective, and productive work environment, District funds may be used to pay for individual ~~individual~~ ~~or~~ group meals during meetings that require extended time (for example, all-day meetings) or take place after normal work hours, as specified in ~~the~~ Administrative Directive [insert link].

Meals and refreshments for regular staff meetings or meals and refreshments at

social events are not allowed. Minimum group size for meeting meals shall be specified in the Administrative Directive.

Meal expenditures shall be reasonable and typically in alignment with GSA per diem limits. Gross deviations from those standards may result in PCard infractions and/or repayment obligations.

a) Definition:

a. Meals are defined to include food and non-alcoholic beverages provided at breakfast, lunch, or dinner.

b. Refreshments are defined to include non-alcoholic beverages and snack items that are less extensive than full meals.

a)b) Meals or refreshments for staff and volunteers ^[EL4] may be provided by the District as part of Board meetings, at District or building-level committee meetings, professional development trainings, District-authorized advisory committees, community engagement events, or other District-approved activities, subject to specific requirements as within reasonable limits and as detailed in Administrative Directive [xxx] [insert link].

b)c) Refreshments may be provided by the District for employees at the discretion of the overseeing administrator for mandatory meetings for staff scheduled outside of the normal work day or that by necessity extend over a meal period, subject to specific requirements within reasonable limits and as detailed in Administrative Directive [xxx] [insert link].

d) Meals not directly business-related may not be provided to staff or others at the District's expense.

DD, ^[ELS]

e) The purchase of alcoholic beverages with District funds is strictly prohibited.

2) Gifts

There are occasions when Board members, administrators, or other District staff may want to recognize employees, and they, ~~A Board member, administrator, or other District employee~~ may provide such recognition at his/her/their personal expense only, unless as otherwise permitted below, and at all times in compliance with Oregon law:

a) The Department of Human Resources and/or the Board may provide a small token of appreciation for a Board member's or employee's retirement or years of service and other related service activities utilizing District funds, ~~as approved in advance.~~ Approval for this must be sought in the method outlined in the Administrative Directive [xxx] (Link here). For example, the Board generally proclaims special recognition for classified employees' week and teacher appreciation week, and Board members may receive plaques in their honor, or framed certificates, or student art for their service to the District. The District also may provide an item that acknowledges significant and extraordinary work

on behalf of an employee (e.g., a framed certificate).

- b) Modest gift items ~~(such as gift cards)~~ may be purchased and distributed as incentives for students or community members to participate in district-sponsored activities under certain circumstances. Only under certain circumstances should gift cards for students and community members be purchased and distributed. Details on the authorization process and accountability procedures are ~~—stipulated—provided~~ in ~~the~~ Administrative Directive ~~[xxx]~~.

Gift cards may never be purchased for employees.

All other expenditures of District funds for gifts is permitted only with prior authorization from the Board or Superintendent.

3) Grant Funds

Grant funds are subject to the same guidelines as outlined in this policy, ~~unless the in addition to any other restrictions that are imposed by the~~ granting agency ~~has additional restrictions~~. Expenditures for food and drink may be made with grant funds if the event requiring the refreshments was included in the grant proposal and approved by the granting agency.

[INSERT link to AD:]