

## 8.30.010-P District Funds for Purchase of Meals and Refreshments for Meeting

The Board recognizes there may be occasions when it is appropriate for Board members, administrators and others to expend District funds in the course of conducting District business to provide meals or refreshments (i.e., bakery goods, snacks, fruit, punch, coffee, tea, soft drinks, etc.). The purchase of gifts may also be approved in certain situations. Such occasions may include, but are not limited to, community meetings and other outreach events, various District and building level meetings, contributions or outstanding service to the District and other District and school-sponsored activities. [EC1]

The use of District funds, as used in this policy, means the use of money in any of the general accounts of the District. This includes the General Fund, Bond Fund, and others. It also includes money in student body accounts held at each school that are derived from any student activity or from parent organizations. Exceptions are funds collected from staff members or others for the specific purpose of providing gifts or parties.

[EC2]

### 1) Meals and Refreshments

District funds may be used to pay for individual or group meals only if official District business is being conducted during the time in which the meal is provided and only if the meal provides a particularly practical time or setting for the discussion, consistent with the following:

- a) Meals may be provided by the District as part of Board work sessions, at District or building-level committee meetings, professional development trainings, or other District-approved activities.
- b) Refreshments may be provided by the District for employees at the discretion of the administrator for mandatory meetings for staff scheduled outside of the normal work day.

Meals not directly business related may be provided to staff or others at the individual's expense only.

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

### 2) Gifts

There are numerous occasions that may arise when Board members, administrators, or other District staff may feel the need to recognize employees. A Board member, administrator or other District employee may provide such recognition at his/her expense only, unless as otherwise permitted below:

- a) The Department of Human Resources may provide a small token of appreciation for a

Board member's or employee's retirement or years of service and other related activities utilizing district funds budgeted for this exclusive use. 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;

- b) Administrators may purchase modest gift items as an incentive for students, however, the giving of gift cards is prohibited;
- c) 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. Additional or other expenditures for food and drink may be made with grant funds when the event requiring the refreshments was included in the grant proposal and approved by the granting agency.

In order to comply with statutory requirements, the board directs the following:

1. Meals are defined as food provided at a customary time or occasion for eating (i.e. breakfast, lunch, dinner). Meals are generally more extensive than snacks.
2. Refreshments such as a beverage and/or pastry are considered snack items provided at times not generally a customary mealtime.
3. District funds may be used for expenditures for meals for District employees if an Administrator schedules a working lunch, training session, workshop involving district business or if a group works through a meal period and no meal break is provided.
4. District funds may be used for expenditures for refreshments for District employees at the discretion of the Administrator if the Administrator schedules a mandatory meeting for staff during or outside of the normal work day.
5. Administrators may, at their discretion, purchase nominal food and drink for meetings involving members of the community who are voluntarily assisting the District in its mission.
6. Administrators are expected to exercise prudent and appropriate judgment in the expenditure of District funds for food or drink.
7. Grant funds are subject to the same guidelines as outlined in this policy. Additional or other expenditures for food and drink may be made with grant funds when the event requiring the refreshments was included in the grant proposal and approved by the granting agency.

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History: Government Standards and Practices Commission staff opinion No. 01S-016 and ORS 244.040(1)(a)-  
Adepted 2/28/2005; BA 3224.

## 8.30.010-P District Funds for Purchase of Meals and Refreshments for Meeting

The Board recognizes there may be occasions when it is appropriate for Board members, administrators and others to expend District funds in the course of conducting District business to provide meals or refreshments (i.e., bakery goods, snacks, fruit, punch, coffee, tea, soft drinks, etc.). The purchase of gifts may also be approved in certain situations. Such occasions may include, but are not limited to, community meetings and other outreach events, various District and building level meetings, contributions or outstanding service to the District and other District and school-sponsored activities.

The use of District funds, as used in this policy, means the use of money in any of the general accounts of the District. This includes the General Fund, Bond Fund, and others. It also includes money in student body accounts held at each school that are derived from any student activity or from parent organizations. Exceptions are funds collected from staff members or others for the specific purpose of providing gifts or parties.

### 1) Meals and Refreshments

District funds may be used to pay for individual or group meals only if official District business is being conducted during the time in which the meal is provided and only if the meal provides a particularly practical time or setting for the discussion, consistent with the following:

- a) Meals may be provided by the District as part of Board work sessions, at District or building-level committee meetings, professional development trainings, or other District-approved activities.
- b) Refreshments may be provided by the District for employees at the discretion of the administrator for mandatory meetings for staff scheduled outside of the normal work day.

Meals not directly business related may be provided to staff or others at the individual's expense only.

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

### 2) Gifts

There are numerous occasions that may arise when Board members, administrators, or other District staff may feel the need to recognize employees. A Board member, administrator or other District employee may provide such recognition at his/her expense only, unless as otherwise permitted below:

- a) The Department of Human Resources may provide a small token of appreciation for a Board member's or employee's retirement or years of service and other related activities utilizing district funds budgeted for this exclusive use. 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;

- b) Administrators may purchase modest gift items as an incentive for students, however, the giving of gift cards is prohibited;
- c) 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. Additional or other expenditures for food and drink may be made with grant funds when the event requiring the refreshments was included in the grant proposal and approved by the granting agency.

# OSBA Model Sample Policy

Code: DJ  
Adopted:

## District Purchasing

The function of district purchasing is to serve the educational program by providing the necessary supplies, equipment and services. Items commonly used in the various schools and their subdivisions will be standardized and be consistent with educational goals and in the interest of efficiency or economy.

The [business manager] is appointed by the Board to serve as purchasing agent. He/She will be responsible for developing and administering the district's purchasing program.

No obligation may be incurred by any officer or employee of the Board unless that expenditure has been authorized in the budget, by Board action and/or Board policy. In all cases calling for the expenditure of district money, except payroll, a requisition and purchase order system must be used.

No purchase [with the exception of a petty cash purchase] will be authorized unless covered by an approved purchase order. No bills will be approved for payment unless purchases were made with an approved purchase order.

The superintendent or designee is authorized to enter into and approve payment on contracts obligating district funds [not to exceed \$[10,000] [150,000]] for products, materials, supplies, capital outlay and services that are within current budget appropriations.

The Board shall approve all contracts that are collective bargaining agreements or service contracts that include the provision of labor performed by district employees, such as custodial, food service and transportation services.

The [business manager] will review bills due and payable for the purchase of supplies and services to determine if they are within current budget appropriations. After review, the [business manager] will direct payment of the just claims against the district. The superintendent [and business manager] is [are] responsible for the accuracy of all bills and vouchers.

No Board member, officer, employee or agent of this district shall use or attempt to use his/her official position to obtain financial gain or for avoidance of financial detriment for himself/herself, a relative or a member of their household, or for any business with which the Board member, relative or member of household is associated. [Acceptance of any gratuities, financial or otherwise, from any supplier of materials or services to the district by any Board member, officer or employee of the district is prohibited.]

END OF POLICY

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### Legal Reference(s):

ORS 244.040

ORS Chapters 279, 279A, 279B, 279C

ORS 294.311

ORS 328.441 to -328.470

ORS 332.075

OAR 125-055-0040

# DISCLAIMER

Attached are the model policy and/or administrative regulation sample(s) you requested. You may print these and should present them to the school board for discussion, modifications and final adoption. The model samples CANNOT be adopted in the current format. You must make a choice for all text in brackets when present.

# OSBA Model Sample Policy

Code: DJ-AR  
Revised/Reviewed:

## Expenditure of District Funds for Meals, Refreshments and Gifts

The district recognizes there may be occasions when it is appropriate for Board members, administrators and others to expend district funds in the course of conducting district business to provide meals or refreshments (i.e., bakery goods, snacks, fruit, punch, coffee, tea, soft drinks, etc.). The purchase of gifts may also be approved in certain situations. Such occasions may include, but are not limited to, various district and building level meetings, gatherings to celebrate district successes or recognize individual achievements, contributions or outstanding service to the district and other district and school-sponsored activities. Such expenditures may be made with prior [Board] [superintendent] approval only, subject to the provisions of this administrative regulation.

The use of district funds, as used in this regulation, means the use of money in any of the general accounts of the district. This includes the General Fund, Food Service Fund and others. It also includes money in student body accounts held at each school that are derived from any student activity or from parent organizations. Exceptions are funds collected from staff members or others for the specific purpose of providing gifts or parties. It is also recognized that buildings may have established a "social fund" or "sunshine fund" to which each staff member may voluntarily contribute. Such funds are generally used for birthday recognition, bereavement and illness acknowledgment activities, etc. These funds are also exempt from the following requirements.

### Meals and Refreshments

District funds may be used to pay for individual or group meals only if official district business is being conducted during the time in which the meal is provided and only if the meal provides a particularly practical time or setting for the discussion, consistent with Board policy and the following:

1. Meals may be provided by the district to recognize the contributions of staff, through retirement dinners or other recognition events;
2. Meals may be provided by the district as a part of Board or administrative work sessions, at district or building-level committee meetings or other district-approved activities.

Meals not directly business related may be provided to staff or others at the individual's expense only.

Board members, principals and other district administrative staff may use district funds to provide refreshments for staff, parents or others at meetings, in-service programs or other similar district or school-sponsored activities, [not to exceed [\$ ] per participant and] subject to the following additional requirements:

1. The purchase of alcoholic beverages with district funds is strictly prohibited;
2. The use of district funds for parties is prohibited.

## Gifts

There are numerous occasions that may arise whereby Board members, administrators or other district staff may feel the need to recognize employees (i.e., Administrative Professional's Day, teacher appreciation week, classified employees' week, birthday, etc.). A Board member, administrator or other district employee may provide such recognition at his/her expense only, unless as otherwise permitted below:

1. The district may provide a small token of appreciation for a Board member's or employee's retirement and years of service and other related activities utilizing district funds, as approved in advance. For example, the Board generally proclaims special recognition for classified employees' week and teacher appreciation week;
2. Administrators may use district funds to provide an appropriate token of appreciation on behalf of the Board. The value of this item may not exceed [\$50] per person;
3. No other expenditure of district funds for gifts is permitted without prior authorization from the Board or superintendent.

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