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New Event and Budget Request Approval Guidelines

1. Prior approval must be obtained for ALL expenditures of GEAR UP funds for any food or other items for GEAR UP-related activities.
2. Activities and events need to be reasonable, allocable, allowable, necessary, and consistent under our grant, GEAR UP regulations, and federal EDGAR cost principles. They also must be consistent with past guidance for our federal program officers, and consistent across the grant and throughout the years of the grant.
3. Based on the guidance regarding a reasonable expenditure given our budget and the needs of the activity, it should be prudent and necessary to achieve the purpose of the activity. On food and beverages, as these are not typically allowed under federal regulations, we must have an exception by approval, therefore it is expected that we be prudent with those purchases.

Event Request Approval Procedures

- *First* consult with your direct supervisor about a desired event.

- After consulting with the direct supervisor, the requestor must submit a written estimated budget request. All other counselors, including FYS, will use the New Event and Budget Request form on the website to create a request, which will go to their supervisor and then to the statewide director for final approval signature. (https://www.uvu.edu/gear-up/grant-administration/employeeresources/index.html)
- Event requests should include:
    - Region
    - Date of event
    - EVENT Name (This should be the Academic Purpose of the event, not the food or promotional themes. ie: Lunchtime carnival)
    - Grant Objective drop down menu.
    - Event Summary. This is where you would give a description of the event including food and promotional theme.
    - Attendance numbers and types (student, parent, staff, volunteer, guests applicable to event)
    - Food types/cost/ vendor (indicate breakfast, lunch, dinner, or snack)
    - Estimated food cost per person
    - Supplies (if needed) which may include paper products, advertising materials etc.
    - Travel cost (buses) Do not break down bus cost by student. Instead add “1” in the student column and the bus total in the total column.
    - Total amount requested automatically populates.

Do not add staff count for lunch and snacks to your budget request if the event is during a regular workday, but if staff attend the event they can be added to attendance for the expense report. Staff can be included on your budget request for snacks and lunch if the event is off site ie: Campus visit.

***Do not sign your budget request before the event.** If signed, Adobe sign will not let you edit the form. Also, check the expiration date of your document, located at the top right corner of your adobe screen and extend the date if needed. Once your event has been completed, fill out the other half of the form with actual expenditures, then sign to attach to your expense report.*

- Requests should be submitted per semester. Requests can also be submitted on an as needed basis, *always* submit your request at least two weeks prior to the event for approval.
- All events where food will be provided should be academic in nature and be long enough to warrant the need for food.
- All purchases must be tax exempt.
- You cannot spend more than the total amount requested. You can only spend on each participant the amount you requested per person.
- Snacks and supplies used for tabling can be requested by using the Purchase Request Form. https://na3.documents.adobe.com/public/esignWidget?wid=CBFCIBAA3AAABLblqZhASluo3v9Ri-J2zJItGMiOVMnGJ2orL4XijZjM9dZhesCwopK9K1MKi2B6_GfacWMY* This form is used when the event does not require sign in sheets to attach to the expense reports, and should be used judiciously.
- The approved amount per student for meals has changed to the following:
    - Breakfast = $10
    - Lunch = $12
    - Dinner = $15
    - Snack = $3
- A 10% tip can be included on certain purchases, please include it on a line item of your request.
- Delivery charges will be approved on a case by case basis, and only when the circumstance requires it. Please include it on a line item of your request.
- All leftover food purchased is required to be used for students. If the food is perishable and cannot be saved for future student events, it is permissible to distribute to GEAR UP students first then GEAR UP employees.
- Events held at UVU must be scheduled through 25LIVE and register through risk management at the link below if minors will be on campus. https://www.uvu.edu/riskmanagement/
- **All food (snacks included) that is to be purchased for students on UVU campus or UVU owned property must be purchased from Dining services (if over 100 attendees) or vendors on UVU campus (if under 100 attendees).**
- **To purchase food vouchers, email your request to dining services and they will bill to our index. (G20052) Request a receipt and turn in to Admin.**

After the event: (See Purchasing Card Approval Process)

All counselors, including FYS, will fill out and sign the New Event and Budget Request form with actual costs and include this with receipts, sign in sheets and compass report for the event.

Overnight Campus Tours Approval Request

Approval requests for overnight campus tours will be included with your semester event requests and should include:

- Region
- Event Name
- Date of Event
- Grant Objective/Summary of event
- Attendance Expected
- Registration Cost (May need to be paid with PO)
- Estimated Food Cost/Food Vendor (indicate Breakfast, Lunch, Dinner or Snack)
- Food Cost per person
- Supplies (If needed)
- Travel cost (A PO must be created for any BUSES)
- Hotel Accommodations for staff/driver
- Total Amount Requested

A group travel request must also be completed and approved in concur and all expenses for overnight campus tours will be purchased on the supervising counselors travel card except for the Buses. Depending on the campus, Registration may need to be paid with a requisition check if they will not accept the Travel Visa Card. You will also need to submit a request to use your travel card for food at this link.
https://my.uvu.edu/employees/purchasing-travel/group_meal_exec_approval.html

After the trip, a concur expense report will need to be completed, including all receipts, the event checklist and sign in sheets.

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