



APPROVAL DATE:

09-12-12

APPROVED BY:

Carl Dudley, WIB Chair

**COUNTY OF SAN LUIS OBISPO  
DEPARTMENT OF SOCIAL SERVICES**

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**POLICY NO:** 35-08  
**TO:** Service Providers  
**EFFECTIVE:** July 1, 2012  
**SUBJECT:** Refreshment/Meal Expenditures

**REFERENCES:**

- Workforce Investment Act (WIA) of 1998
- Office of Management and Budget Circulars (OMB) A-87 (Revised 5/10/04)

**BACKGROUND:**

The WIA Final Rule, Title 20 CFR 667.200(c) provides guidance regarding cost principles and allowable costs and refers subrecipients to OMB circulars for specific requirements. The OMB circulars provide guidance according to type of organization, and the guidance may vary from one circular to another. Educational institutions are bound by OMB Circular A-21, governmental entities by OMB Circular A-87, nonprofit organizations by OMB Circular A-122, and for-profit organizations by Title 48 CFR Part 31.

**PURPOSE:**

This Policy is to give clarification of when it is permitted to provide refreshments (food and beverage) with WIA funds.

**POLICY:**

Costs of meetings and conferences, the primary purpose of which is the dissemination of technical information, are allowable. This includes costs of meals, transportation, rental of facilities, speakers' fees, and other items incidental to such meetings or conferences.

San Luis Obispo County allows for the purchase of refreshments/meals (not to exceed the County meal reimbursement rate) for the following events:

- When the County hosts other County or State agency conferences or meetings.

- Specific unit or division events where staff receive “specialized training or instruction” to help improve their job functions (not to include incidental and/or routine meetings with staff)
- Specific events where participants receive specialized training to help improve their opportunities to obtain employment.

Costs of alcoholic beverages, entertainment, including amusement, diversion, and social activities and any costs directly associated with such costs (such as tickets to shows or sports events, meals, lodging, rentals, transportation, and gratuities) are **unallowable**.

**PROCEDURE:**

Approval from the Administrative Entity is required prior to the event in which the meals/refreshments would be purchased. The following information should be included in the request for use of funds:

- Name of event
- Focus topic(s)
- Date, Time, and Location
- Purpose of event
- Outside expert providing the training
- Number of Attendees
- Agencies attending
- Estimated cost

No later than two weeks prior to the event, please complete and e-mail the *SLO LWIA Refreshment/Meal Expenditure Authorization Form* to the Administrative Entity/Fiscal Agent staff, attention Maggie Balint (mbalint@co.slo.ca.us) to request authorization to use WIA funds.

**ACTION:**

The Administrative Entity for the WIB and its service providers shall follow this policy. This policy shall remain in effect until such time that a revision is required.

**INQUIRIES:**

Inquiries should be addressed to WIB Admin at [wibadmin@co.slo.ca.us](mailto:wibadmin@co.slo.ca.us).

**REVISION HISTORY:**

DATE	DETAILS
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**SLO LWIA REFRESHMENT/MEAL EXPENDITURE AUTHORIZATION FORM**

**Name of Requestor:**

**Date Request Submitted:**

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**Name of Event:**

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**Focus Topic(s):**

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**Date of Event:**

**Time:**

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**Location of Event:**

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**Purpose of Event:**

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**Outside Expert Information:**

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**No of Attendees:**

**Agencies Attending:**

**Estimated Cost:**

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***Administrative Entity/Fiscal Agent Review***

**Approval:**

Approved    Denied

**Reason:**

**Approving Party:**

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