

Planning an Event

Agenda

- > **Components of Events:**
 - > **Catering**
 - > **Hotels**
 - > **Conferences**
 - > **Charters and Transportation**
 - > **Event Requisition Best Practices in Workday**
 - > **Resources**



What to know before planning an Event

- UW Procurement Services has negotiated contracts and maintains a list of approved caterers and hotels as well as many suppliers providing event planning services, equipment rentals, and charters to assist campus with their special event needs.
- If the dollar amount of your request is greater than the Direct Buy limit (\$10,000 including shipping and handling and excluding tax), and you are not using a UW Contract supplier a sole source justification must be provided or quotes obtained In consultation with a Procurement Service buyer to ensure compliance with the competitive solicitation requirements.
- Check to see if there is a supplier that can meet your needs that has a Contract with the UW by searching within Workday or the UW Public Contract Portal. Some of the benefits of using a Contracted Supplier are:
 - ✓ Discounted pricing
 - ✓ Terms and conditions are already negotiated
 - ✓ No need to provide a sole source justification for purchase over \$10K
- Make sure not to sign any supplier Agreement or Contract and have a Contract Manager at Procurement Services review it prior to the Event.
 - ✓ Deposits
 - ✓ Legal language (Force Majeure, indemnification etc.)
- Contact a Procurement Services Contract Manager by visiting the Subject Matter Experts webpage.

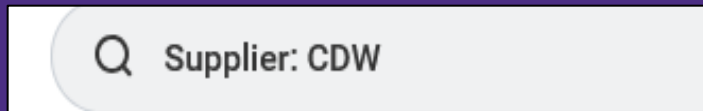


Searching for Contracts within Workday

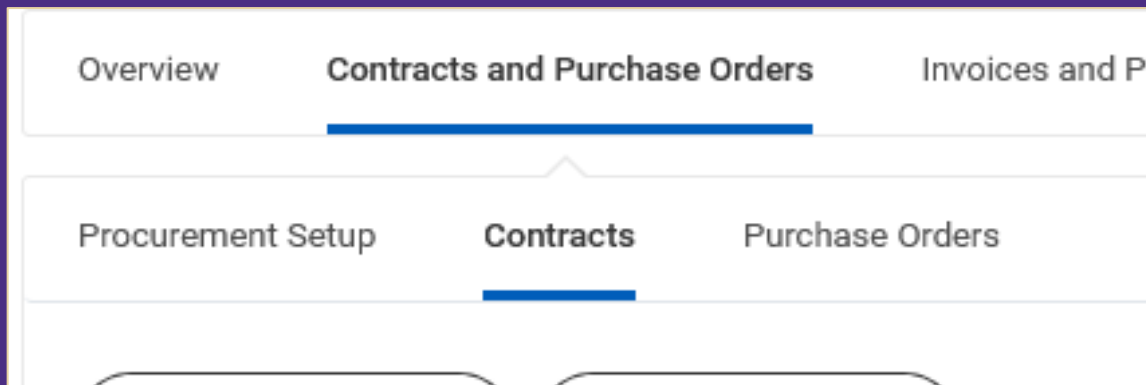
- There are multiple ways to identify if a supplier in Workday has a contract you can use to make a purchase. The easiest is to use the search bar in Workday:

Searching by Supplier:

- In the main **Workday Search Bar** - type **Supplier:** then type the Supplier name (as shown in the example below)



- A list of suppliers will populate. Click on the name of the one you are interested in.
- When the Supplier page loads, click on the **“Contracts and Purchase Orders”** tab, and then the sub-heading **“Contracts”**
- Review the list of supplier contracts that are associated with the supplier.



Searching for Contracts within Workday

- Hover over the magnifying glass to the left of the SPC number and right click for a menu to pop up. Select “**See in new Tab**” to open the contract in a new browser window and read more about its description and Overview.
- Choose the contract with the best fit (description) and read the Overview to confirm. Be sure to review the scope and usage of the agreement before selecting the contract. You will need to return to your original browser tab to select the Contract.

FRESH FAMILY LLC **Supplier**

Supplier ID SPL-013013

Address 8605 S 218TH ST
KENT, WA 98031
United States of America

Approval Status Approved

Website <http://www.freshfamilyco.com>
[Go To Strategic Sourcing Supplier P](#)

Overview

Contracts and Purchase Orders

Invoices and Payments

Supplier Connections

Change History

Tax In

Procurement Setup

Contracts

Purchase Orders

Create Contract


Find Contracts

Recent Contracts 2 items

Supplier Contract	Contract Number	Contract Name	Supplier Contract Type	Status	Company
	SPC-008017	UW Bothell Pressure Washing and Graffiti Removal	Purchased Goods & Services	Approved	UW1861 University of Washington
	SPC-007700	UWF ENT Site Clean-Up & Graffiti Removal	Purchased Goods & Services	Approved	Security: All Companies (Security COH 01)

UW Public Contract and Bidding Portal

PROCUREMENT SERVICES




PLAN & BUY

Popular Options:

- [New Process Quick Guide](#)
- [Event Planning](#)
- [Buying from Contracts](#)
- [Sole Source Purchasing](#)
- [Travel Purchasing](#)

LEARN MORE >




PAY & RECEIVE


Popular Options:

- [System Receiving](#)
- [Expense Reports](#)
- [Supplier Invoice Request](#)
- [Miscellaneous Payment Request](#)


LEARN MORE >



UW CONTRACTS



PROCARD



TRAINING (PC

UW Public Contract and Bidding Portal

- The Portal is located on the Procurement Services home webpage and provides visibility into Contracts that UW staff are able to leverage within their departments.
- Users can search for Contracts in a variety of ways. You can search by:
 - ✓ Supplier Name/Number
 - ✓ Contract Number/Contract Title
 - ✓ Keyword Search
- After entering your search criteria, click the View Report button to see the Contract information results. Leaving the fields blank will display all available Contracts.

The screenshot shows the 'Bids and Contracts' section of the University of Washington's procurement portal. At the top, the University of Washington logo and name are displayed. Below this, the 'Bids and Contracts' heading is followed by two tabs: 'BID OPPORTUNITIES' with a count of 64, and 'CONTRACTS' with a count of 1663. The 'CONTRACTS' tab is currently selected. A search bar is located below the tabs, with the placeholder text 'Search by Contract ID, Title, Type and more'. To the right of the search bar is a 'FILTERS' button with a dropdown arrow. Below the search bar is a table with the following columns: CONTRACT ID, TITLE, SUPPLIER NAME, TYPE, START DATE, END DATE, and ACTIONS. The first row of the table shows the following data: CONTRACT ID 3476, TITLE MS7620: Bioseal Specialty Sterilization Products, SUPPLIER NAME BIOSEAL INC, TYPE Purchased Goods & Services, START DATE 4/1/2020, END DATE 3/31/2026, and an ACTIONS button labeled DETAILS.

CONTRACT ID	TITLE	SUPPLIER NAME	TYPE	START DATE	END DATE	ACTIONS
3476	MS7620: Bioseal Specialty Sterilization Products	BIOSEAL INC	Purchased Goods & Services	4/1/2020	3/31/2026	DETAILS




Delegated Signature Authority

- Delegated signature authority is granted to the University of Washington by the State Legislature and is further delegated internally to the Executive Director for the Procurement Services department, who has further delegated signature authority to Procurement Services buying staff.
- Procurement Services Contract Managers are considered agents of the University and are authorized to sign contracts on behalf of the university.
- Campus departments do not have the authority to execute or sign contracts, including maintenance and service agreements.


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- It is recommended that Contracts, or other documents requiring a signature, be reviewed by a Procurement Services Contract Manager regardless of the method of payment or dollar amount.
 - To submit a Contract or other documents requiring signature to be reviewed by a Procurement Services Contract Manager, you can submit through the UW Connect Finance form “General Finance Help Request” <https://uwconnect.uw.edu/finance>

✓ Note: Starting May 1st there will be a new Procurement Contract Review form available

Procurement Services – Event Planning Webpage




PROCUREMENT SERVICES



PLAN & BUY

Popular Options:


- [New Process Quick Guide](#)
- [Event Planning](#)
- [Buying from Contracts](#)
- [Sales Sources](#)



PAY & RECEIVE

Popular Options:

- [System Receiving](#)
- [Expense Reports](#)
- [Supplier Invoice Request](#)
- [Miscellaneous](#)



REPORTING

Popular Options:

- [Tools for Reconciling](#)
- [ProCard Verification](#)
- [Procurement Fiscal Year End](#)



New! Event Planning Quick Guide



Event and Conference Planning Guidelines and Resources

Requirements for hosting an event:

Conferences and UW-hosted events are subject to University [Purchasing Policies and Procedures](#) with regard to contracting and payments.

Considerations:

- If using a UW Contract, reference the contract number on the supplier agreement, and on the Workday requisition.
- If the total cost is over the direct buy limit of \$10,000 and a non-contracted supplier has been selected. A [Sole Source Justification](#) is required.
- Deposits for hotels/venues and catering are allowed if not more than 25% of the total cost and may be paid using Procard. If a higher deposit is requested, consult with Procurement Services.
- Lodging must comply with [Travel UW Policy](#)
- Pay attention to cancellation terms and dates in the agreement.



Catering - UW Campus Resources

- Consider using Bay Laurel Catering for your event (Housing & Food Services):
 - ✓ Have been catering events at UW since 2007
 - ✓ For UW departments, Workday coding is used to charge via ISD (Internal Sales Document)/Workday
 - ✓ Purchases made using a UW Cost Center of Grant are exempt from Washington State sales tax.
 - ✓ Do not accept gratuities for any services.
 - ✓ As the only UW Environmental Health and Safety-approved caterer you won't need to navigate the food permit process.
 - ✓ Does not accept ProCard from UW departments



Catering – UW Contract Supplier Pool

- Check out the list of over 40 Caterers that are under contract with the UW by accessing the spreadsheet on the Event Planning webpage on the Procurement Services home page.
- ✓ All Suppliers on the list have completed the registration and submitted the required insurance and health permits, unless noted on the list. Please reference UW Contract #UW-19-0038 when using any of the companies.
- ✓ Suppliers on the list are subject to EH&S approval for individual events, and UW personnel hosting or sponsoring an event at a UW location where food will be served, sold, or given away should review EH&S guidance regarding when to apply for a **Temporary Food Service Permit**. The permit application allows EH&S to assess the safety of the food source, evaluate food preparation steps, handling, and storage to protect health and prevent food borne illness.
- ✓ Please remember to review **University Food Policy Guidance** and to complete the **Food Approval Form 1798**.
- ✓ **Reasons a permit may be denied** by EH&S.



Catering Supplier Pool Spreadsheet

CONTRACT AWARD NUMBER <small>(contact Claudia Christensen: laediac@uw.edu if there is a caterer you would like added to the</small>	COMPANY NAME	CONTACT	PHONE	EMAIL	WEBSITE	CATIONS SERV	ADDITIONAL INFORMATION	SPECIALITY	CERTIFICATION: SB=Small Business WOSB = Women Owned Small Business SDB = Small Disadvantaged Business Certified by OMWBE
UW-19-0038-04	Arista Catering	Brett Willard	206-250-5143	brett@aristacatering.com	https://cateringseattle.com	Seattle, Bothell, Tacoma	Continental Breakfast, Mid-break snacks/Afternoon Break, Boxed Lunch, Reception, Full Service	We full service catering for breakfast, lunch, and dinner. We can also provide appetizer and/or bar catering for events. We offer a wide variety of cuisines and are happy to work with you to customize something for your	SB
UW-19-0038-34	Baked in Bosnia	Eric Mansell	608-436-0297	eric@bakedinbosnia.com	https://www.bakedinbosnia.com	Seattle, Bothell	Mid-break snacks/Afternoon Break, Boxed Lunch, Reception	Elevated Comfort Food, Balkan, Eastern European, European Fusion, Mexican, Deli /	SB
UW-19-0038-28	Beana's Hand Pies and Bakery	Bernita McKinion	206- 519-2248	beanasfriedpies@gmail.com	https://beanashandpiesandbakery.com	Seattle	Continental Breakfast, Mid-break snacks/Afternoon Break	We specialize in southern fried hand pies.	SB,
UW-19-0038-32	Cameron Catering	Suzanne Cameron	206-781-8149	Suzanne@cameroncatering.com	https://www.cameroncatering.com	Seattle, Bothell	Continental Breakfast, Mid-break snacks/Afternoon Break, Boxed Lunch, Reception, Full Service	full service events	SB, WOSB
UW-19-0038-17	Catering By Corinne	Corinne R Kocher	206-226-8230	cateringbycorinne@gmail.com	https://www.cateringbycorinne.com	Seattle	Full Service, discount available	Farm to Table, Seasonal	WOSB
UW-19-0038-29	Chef Dane Catering	Carol Anne Lee	206-794-0812	carolanne@chefdane.com	www.chefdane.com	Seattle, Bothell	Boxed Lunch, Reception, Full Service	Northwest, comfort foods, flexibility of menus	SB, WOSB
UW-19-0038-34	Chop Chop West African Cuisine	Tierra Tay	253-226-7232	tierra@chopchopfoods.com	https://chopchopfoods.com	Seattle, Tacoma	Mid-break snacks/Afternoon Break, Boxed Lunch, Reception, Full Service	West African -American Fusion: We specialize in traditional west African foods such as jollof rice and fufu accompanied by soup. We also provide guest tailored small bite menus blending both American and African cultures.	SB, SDB, WOSB
UW-19-0038-36	Design Perfect Catering	Sharon Rogers	425-467-8129	sharon@dpcatering.com	www.dpcatering.com	Seattle, Bothell	Continental Breakfast, Mid-break snacks/Afternoon Break, Boxed Lunch, Reception, Full Service	Quick Pick Menus - Dietary Restrictions - Customization - Themed	SB, WOSB

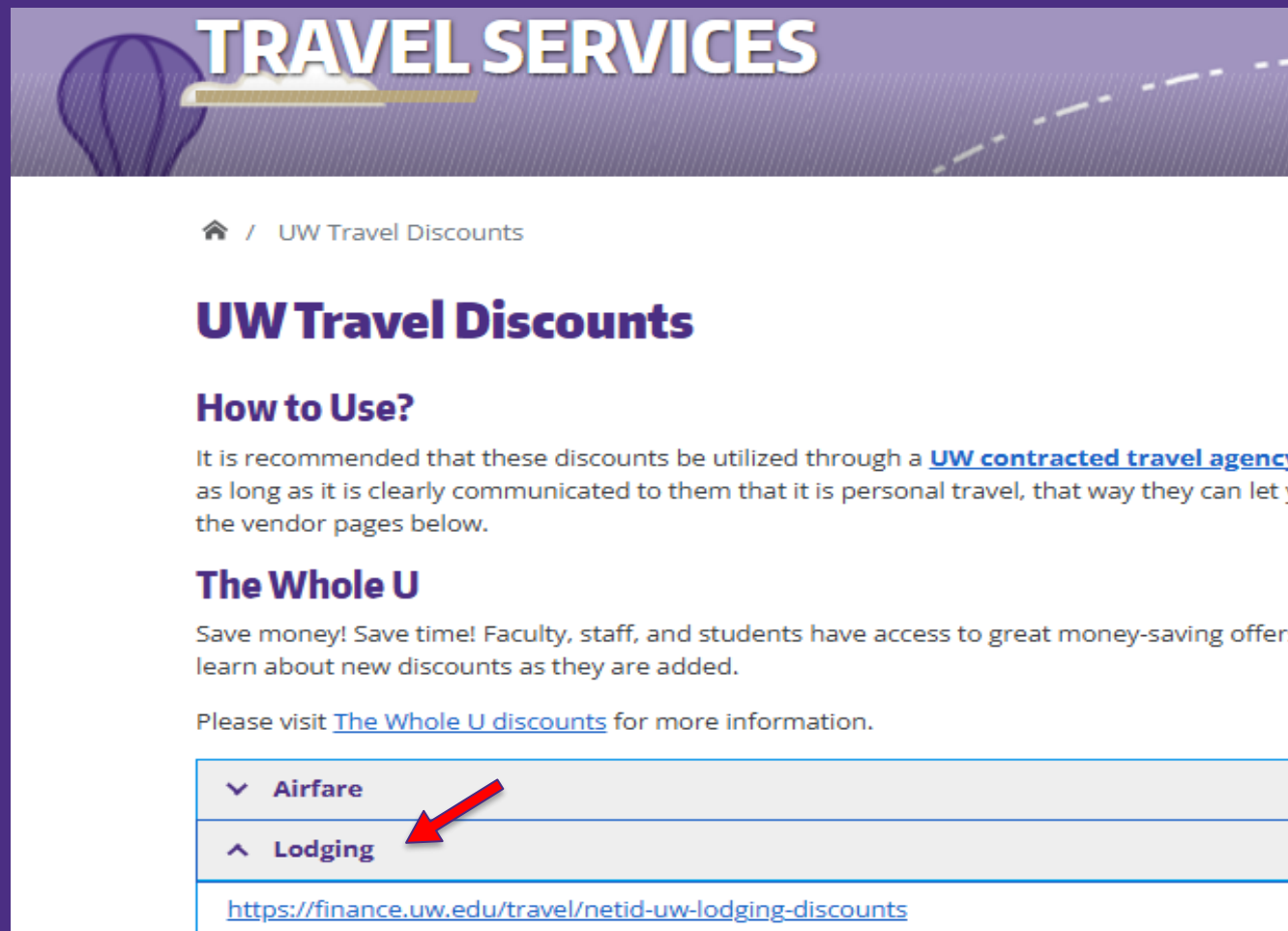


Hotels

- Using a Hotel that is under Contract/Agreement with the UW is highly recommended for your convenience because of greater cost savings, ease of booking reservations and lower risk.
- The list of UW Hotels with Contracts/Agreements can be found by visiting the Travel Services website and searching under the Lodging drop down menu, or by doing a search in the UW Public Contract Portal.
- Pre-negotiated terms and conditions allows for lower risk and protection for campus
- Hotels on the list can be used for conferences, visiting families, sports team members etc.
- UW has negotiated rates and special deals (meeting rooms at no charge with minimum number of hotel rooms for conferences.
 - ✓ Note: Updated Hotel Contract pool coming soon.



Hotels – Travel Services Website



TRAVEL SERVICES

Home / UW Travel Discounts

UW Travel Discounts

How to Use?

It is recommended that these discounts be utilized through a [UW contracted travel agency](#), as long as it is clearly communicated to them that it is personal travel, that way they can let you know the vendor pages below.

The Whole U

Save money! Save time! Faculty, staff, and students have access to great money-saving offers. Learn about new discounts as they are added.

Please visit [The Whole U discounts](#) for more information.

▼ Airfare
▲ Lodging

<https://finance.uw.edu/travel/netid-uw-lodging-discounts>



Travel Services – Hotel Contract/Agreement List

Vendor Name	Location Address	Contact	More Information or Direct Booking Link
3Sixty by Reside	Multiple	Catherine Hussain	Phone: 888-389-0500 Email: Reservations Ask for UW rate More Information 10% Off More information/booking
AC Hotel Seattle Downtown	117 Yale Ave N, Seattle, WA 98109	Timothy Carr	Phone: 206-492-7963 Ask for UW Rate or Corp/Promotion Code: UWD 15% Off Best Available Rate More information/booking
Airbnb	Multiple		More information/booking
Arctic Club Hotel	700 3rd Ave, Seattle, WA 98104	Monica Ocampo	More information/booking Promotion Code: HUSKIES
Astra Hotel, Seattle	300 Terry Ave N, Seattle, WA 98109	Melissan Falcone	More information/booking Promotion Code: U68 10% Off Best Available Rate
Bell Harbor International Conference Center	2211 Alaskan Way, Pier 66, Seattle, WA 98121	Terina Nelson	More information/booking



Charters/Transportation

- Departments and organizations on campus occasionally need to utilize shuttle and/or charter services for air, land, or sea transportation. Charters range from local, one-day trips to extended multi-day trips spanning many states, or even multiple countries. A list of contracted charter suppliers is below.
- For all charters, using a contracted supplier will minimize risk, save money, and reduce the time necessary to schedule a charter.
- Charters (air/land/sea) require proof of insurance from the service provider. If using a non-Contracted supplier, the Charter company must include the UW Board of Regents as additional insured.
- Below are some best practices for Charters/Transportation:
 - ✓ Vessel charters: Place orders in Workday, not with a Procard. Orders must include the name of vessel and location of cruise.
 - ✓ Air charters: Place orders in Workday, not with a Procard. Order must include the aircraft make and model in the description or memo section of Workday.
- Make sure to read through the important Charter information on the Event Planning webpage.



Conferences

Requirements for hosting an Event:

- Conferences and UW-hosted events are subject to UW Purchasing Policies and Procedures with regard to contracting and payment.
- When selecting a conference venue, please first consider using University facilities/catering or other state facilities or a supplier with a UW Contract before selecting an outside, non-contracted supplier.
- If the department did not select a UW Contracted supplier or UW/State facility, the department is responsible for providing the reason for selecting the supplier (Sole Source Justification).
- The University faculty, staff and students are covered for general liabilities arising from negligent acts and omissions committed in the course and scope of their University duties.
 - ✓ Keep a list of the attendees at the conference and indicate their UW affiliation (i.e., UW employees/faculty, UW students or non-UW)
 - ✓ A copy of the certificate of insurance is available through Risk Management.



Workday Requisition Best Practices - Events

- Deposit best practices:
 - ✓ Procurement Services must sign the Contract before the deposit is paid
 - ✓ The payment method must stay consistent for the entire event
 - ✓ Workday will not allow multiple payment types on a PO (if you pay a deposit with a Procard, Workday prohibits any other payment methods on that PO)
- All attachments with the Requisition must include a contract/agreement signed by buyer, food approval form, and sole source if necessary).
- Make sure to have a Discretionary Cost Center ready to cover alcohol and other expenses that are not allowable on the regular budget if necessary (flowers, decorations items, etc.).
- If you're sending a Hotel rooming list and are doing a group or conference event at a Hotel, be sure to have the Hotel complete and sign a UW Data Processing Agreement along with the Contract.



Resources

- **Procurement Event Planning webpage:** <https://finance.uw.edu/ps/how-to-buy/planning-event>
- **Procurement Buying from Contracts webpage:** <https://finance.uw.edu/ps/how-to-buy/buying-from-uw-contracts>
- **Procurement Subject Matter Experts webpage:** <https://finance.uw.edu/ps/contact-us/subject-matter-experts>
- **Finding UW Contracted Suppliers Job Aid:**
https://uwconnect.uw.edu/finance?id=kb_article_view&sysparm_article=KB0033394
- **UW Housing & Food Services website:** <https://hfs.uw.edu/Home>
- **Environment Health & Safety website:** <https://www.ehs.washington.edu/>
- **Travel Services website:** <https://finance.uw.edu/travel/netid-uw-lodging-discounts>



Questions?



Thank You!

