**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](https://finance.uw.edu/ps/how-to-buy) 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](https://finance.uw.edu/ps/how-to-buy/sole-source-purchasing) 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](https://finance.uw.edu/travel/perdiem?_gl=1*15gjbxi*_ga*MTM1NzAxNzExMC4xNTEwNjg0NTUw*_ga_3T65WK0BM8*MTc0NDMxMTM4MS43MzkuMS4xNzQ0MzExNDI2LjAuMC4w*_gcl_au*OTA5MjAwNTIuMTc0MTE5MjM2Mi4yMDc0OTM4NDI3LjE3NDQwNTE3NzQuMTc0NDA1MTc3NA..*_ga_JLHM9WH4JV*MTc0NDMxMTM4MS43NDIuMS4xNzQ0MzExNDI2LjAuMC4w)
* Pay attention to cancellation terms and dates in the agreement.
* Review Indemnification language in hotel and venue agreements.
  + Indemnification is one sided to the hotel.
  + Is the department willing to take the risk of this clause?
* Will the University have to obtain and provide proof of insurance?

The department will have to obtain a policy for the specific event.

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. This coverage is provided through a self-insurance program established pursuant to RCW 28B.20.250 and governed by the Standing Orders of the Board of Regents. The general liability program provides unlimited coverage and operates on an occurrence basis. It applies to all approved sites of practice or education. A copy of the certificate of insurance is available through [Risk Services](https://risk.uw.edu/proof?_gl=1*1hge07*_ga*MTM1NzAxNzExMC4xNTEwNjg0NTUw*_ga_3T65WK0BM8*MTc0NDI0NzQzNS43MzguMS4xNzQ0MjQ4ODk1LjAuMC4w*_gcl_au*OTA5MjAwNTIuMTc0MTE5MjM2Mi4yMDc0OTM4NDI3LjE3NDQwNTE3NzQuMTc0NDA1MTc3NA..*_ga_JLHM9WH4JV*MTc0NDI0NzQzNS43NDEuMS4xNzQ0MjQ4ODk1LjAuMC4w).

* Charters see: [Charters / Transportation](https://finance.uw.edu/ps/how-to-buy/transportation) Procard is NOT allowed for vessel charters Spend Category: Charters SC1733

**Need help planning an event:**

If you need help planning a conference / event, please see the [University Marketing](https://www.washington.edu/brand/marketing-resources/events-guide-resources/) for resources and guidance.

**Additional Compliance Guidelines:**

UW Departments are required to maintain appropriate supporting documentation for audit

purposes. This includes the following:

**Supplier Selection**

When selecting a conference venue, or caterer, please first consider using a University

facility, other state facility, or a supplier with a UW Contract before selecting a non-contract supplier.

**Identify the Funding Source for the event**

Depending on the Funding Source, additional justification may be required. Will the cost be covered by the participants? Additional Terms and Conditions may apply if working with sponsored programs.

If UW covers the costs of the event, the department needs to comply with the [food per diem](https://finance.uw.edu/ps/resources/food-approval) and [travel per diem](https://finance.uw.edu/travel/perdiem?_gl=1*15gjbxi*_ga*MTM1NzAxNzExMC4xNTEwNjg0NTUw*_ga_3T65WK0BM8*MTc0NDMxMTM4MS43MzkuMS4xNzQ0MzExNDI2LjAuMC4w*_gcl_au*OTA5MjAwNTIuMTc0MTE5MjM2Mi4yMDc0OTM4NDI3LjE3NDQwNTE3NzQuMTc0NDA1MTc3NA..*_ga_JLHM9WH4JV*MTc0NDMxMTM4MS43NDIuMS4xNzQ0MzExNDI2LjAuMC4w). Please note: It is the responsibility of the UW Department to ensure UW employee expenses comply with the UW Policy.

**Food**

University and Washington State policies allow for the purchase of meals and light refreshments for employees, students and official guests. Departments are responsible for understanding and complying with the [UW Food Policy](https://finance.uw.edu/ps/resources/food-approval) Cost of meals and beverages should be itemized. (i.e., alcohol, beer, wine, soda, water, etc.) If alcohol is provided, it must be paid against a discretionary funding source. Review Event Services [Classroom Space Rental](https://eventservices.uw.edu/classroom-rental-policy/) information which includes a food and drink policy.

**Contract or Agreement Review**

Procurement Services recommend contracts and agreements requiring signature should be submitted and reviewed by a Procurement Services buyer regardless of the dollar amount or payment method. Only Procurement Services buying staff have authority to sign contract documents on behalf of the University. If necessary, the buyer will work with the supplier to ensure the final agreement is in accordance with Federal and State laws and University policies.

**Attach the contract or agreement to the Workday requisition,** provide the Event Order Form from the supplier The supplier must agree to provide an itemized breakdown of the costs. This will include separate entries for food, alcohol and additional expenses.

**Review Cancellation and Deposit information,** note important dates and deadlines to make any adjustments or cancellations to prevent fines/penalties. Deposits of 50% of the total cost are allowed.

**List of Attendees**

Departments are required to keep a list of event attendees on file including their UW affiliation (i.e., UW employee, faculty, student or non-UW attendees).

**Brochure, Publication, Announcement or Invitation**

Department is required to keep A brochure, publication or announcement regarding the event.

**Payments:**

Based on the dollar amount and the payment, the department may be approved to pay via Department Procard or Workday Purchase Order. Resources: For additional information, please see the [Procurement Service page, How to Pay,](https://finance.uw.edu/ps/how-to-pay) and specifically the sections regarding [Procard](https://finance.uw.edu/ps/procard/limitsandprofile).