



<b>Alcohol Policy and Procedure</b>		<i>Department:</i> <b>VP Finance and Administration</b>	
		<i>APP No.</i> <b>FIN-007</b>	
<i>Department Manager:</i> <b>Vice President for Finance &amp; Administration</b>	<i>Revised:</i>	<i>Original Effective Date:</i>  October 1, 2018	<b>Page 1</b>
<i>Subject:</i> The Linfield University Alcohol Policy and Procedure serves as a guideline for proper approval, use and reimbursement of alcohol related activity.		<i>Applicable Divisions:</i> <b>All</b>	

*Section*

**PURPOSE**

- A. To provide procedures for approval, use and reimbursement of alcohol related activities for university functions.
- B. To insure that university employees exercise good judgement when serving and consuming alcohol on university business.
- C. To facilitate the request and distribution of university wines for university related events.
- D. To provide for consistent treatment of alcohol related activities.

**SCOPE**

All alcohol purchases for either university events or as part of an official business meeting require the advance approval of the divisional Vice President and/or Vice President of Finance and Administration. Given potential legal liability and State laws regarding underage alcohol consumption, alcohol may only be served at university events by a server holding a valid Oregon Liquor Control Commission Alcohol Server Permit. Employees or other individuals who purchase alcohol for consumption by others should be aware that they assume significant personal legal and financial liability regardless of whether Linfield reimburses the expense. It is the policy of the university to not provide any of alcohol to any individual under the legal drinking age.

Please note that federal and state regulations and rules governing use of private grant funds may prohibit alcohol purchases.

**POLICY OUTLINE**

- 1. Approval Process for University Events**
- 2. Approval for Official Business Meetings**
- 3. Reimbursement for Out-of-Pocket Expenses**
- 4. Procedures and Cooperation**

## **1. APPROVAL PROCESS FOR UNIVERSITY EVENTS**

- Any university events that will serve alcohol (i.e., wine, beer, cider, or any other alcoholic beverage) must be scheduled through the scheduling software, “25Live” [link](#). The reservation must indicate that the event will be serving alcohol. This will begin the approval process in 25Live, including requesting required Oregon Liquor Control Commission (OLCC) information including identification of the licensed pourer/s.
- This request will be sent electronically via 25Live to the Vice President, Finance and Administration for approval. Requestor must secure the division Vice President’s approval as well.
  - Once the event has been approved to serve alcohol, the requestor can then request donated wine from the Evenstad Center for Wine Education (supplies may be limited) using the electronic form: [Request for Wine for Linfield University Events](#). This form requires the following information:
    - Has event which is serving wine been submitted through 25Live and received approval?
    - Name of Event
    - Location of the Event
    - Date of the Event
    - Time of the Event
    - Responsible person for picking up and returning wine
    - Email of requester
    - Responsible Department or Program
    - Amount of white and red wine requested, based on the size and type of event
  - If requesting other spirits to be served:
    - Limited amounts of alcohol may be purchased by the requesting department and be eligible for reimbursement with appropriate Vice President’s approval. Send approved reimbursement request to Accounts Payable. The university credit card may not be used for any bottled/can alcohol purchases.

## **2. OFFICIAL BUSINESS MEETINGS**

- When acting on official university business, e.g., while conducting a business meeting or while representing the university with official guests, and with pre-approval of the President or divisional Vice President, employees may be reimbursed for reasonable meal expenses and may consume and be reimbursed for appropriate alcohol purchases. “Appropriate” will be construed as one drink per person per dinner. A corkage fee for a bottle of wine during these official business meetings can be reimbursed, but not to exceed one bottle per event. No reimbursements will be made for lunchtime alcohol purchases.
- The Vice President for Finance and Administration must pre-approve alcohol reimbursements covering specific university events, including department-based activities.

- No alcohol may be served at activities at which a majority of the participants are students. Under rare circumstances, exceptions will be considered by the Dean of Students.
- Gatherings that are primarily social in nature and attended solely by university employees, for example, staff breakfast/lunch/dinners, including departmental retirement celebrations and holiday parties, do not qualify for payment or reimbursement from the university for any food or beverage, including alcohol.
- The university will not pay for or reimburse alcohol expenses that lack documentation or a clear business purpose.

### **3. REIMBURSEMENT FOR OUT OF POCKET EXPENSE**

- If seeking reimbursement for out of pocket alcohol expenses, use the Linfield University TAR form and check the “Reimbursement/Reconciliation (Actual Costs)” box.
- Receipts are required for reimbursement must include at least one of the following types of supporting documents:
  - Original merchant detailed receipt (photos are accepted), invoice marked PAID, if not available then,
  - Original credit card receipt(s), with itemization

A copy of an employee’s credit card statement is not sufficient support documentation.

#### **Information required on receipts and supporting documentation:**

- Date of purchase
- Vendor name
- Itemized description of goods, services, meals and/or drinks,
- Names of all individuals partaking in the meals or a description of the group and number of attendees if hosting a large group event (over 10 persons.)
- Price in US dollars

### **4. PROCEDURES and COOPERATION**

While the employee and the supervisor are charged with reviewing the reimbursement request and are primarily accountable for the integrity and stewardship of expense reporting under this policy, the Business Office is charged with the responsibility of reporting and reconciling employee expense transactions in accordance with university and IRS guidelines. Accordingly, there may be times when request for clarification or additional documentation is required. We appreciate your cooperation with our accounts payable department as they strive to carry out their responsibilities and insure consistent adherence to university policies.

**Links for forms noted in this document:**

1. The 25Live event scheduling software can be accessed via the following link:  
[25Live Event Scheduling](#)
2. The Request Wine for Linfield University Events form can be accessed via the following link: [Request for Wine for Linfield University Events](#).
3. The Travel Advance Reimbursement (TAR) form can be accessed via the following link:  
[Travel Advance or Expense Reimbursement \(TAR\) Form](#)
4. The Linfield University Visa Credit Card Policy & Employee Agreement can be accessed via the following link:  
[Linfield University Visa Credit Card Policy & Employee Agreement](#)

Date Issued: September 13, 2018

Date Last Revised:

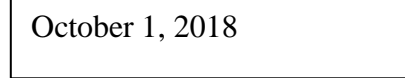
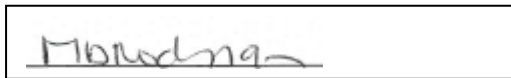
Responsible Executive:

Vice President for Finance and Administration

Responsible Office:

Accounting

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Vice President, Finance and Administration

Date

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This Alcohol Policy and Procedure is hereby approved and is effective immediately.