



THE GEORGE  
WASHINGTON  
UNIVERSITY  
MEDICAL CENTER

## MEMORANDUM

**TO:** Vice Presidents, Departmental Chairs, Department Heads and Cost Center Managers

**FROM:** John F. Williams, MD, EdD, MPH  
Provost and Vice President for Health Affairs

**RE:** Travel and Entertainment Expenditure Limits

**DATE:** March 7, 2006

I continue to be concerned that faculty and staff are not judicious in their choices of venue for travel and business entertainment. As you all should know, our revenues are primarily from tuition and endowments which are both limited and we expect a significant decline in research related revenue in the coming year. As such, everyone should strive to limit expenditures for discretionary activities.

The Medical Center Policy Matrix has recently been reviewed and revised by Medical Center leadership. Several revisions relate to entertainment activities. You will find the document at [http://inside.gwumc.edu/vpha/forms/mcpolicy\\_matrix.pdf](http://inside.gwumc.edu/vpha/forms/mcpolicy_matrix.pdf). The information contained in this document is meant to establish the **limits** for expenditures not the floor. At all times, faculty and staff are expected to use the most economic means possible to secure the objective. I again publish the following questions you should ask prior to any expenditure and include my recommendations.

- **Is the event really necessary from a business or academic point of view?** This includes coffees, lunches, and get-togethers. Unless it is intended for students, the event probably should not incur food costs.
- **Is the selection of the caterer appropriate to the event, e.g. does every event need the most "top shelf" caterer?** Spending limits preclude this and management should not approve payment beyond the limits.
- **When not traveling on business, are meals with consultants and other non-GW staff really necessary or can the business be conducted in offices?** Our facilities are our best assets; I encourage everyone to take advantage of this and conduct business accordingly.
- **Is the selection of the eating establishment appropriate to the business being conducted?** Many "top shelf" restaurants are being used and the per person limits exceeded. Only reasonable meal costs will be reimbursed. Special Guest & Recruitment expenses and limits relate to selective events. Most entertainment expenses fall into the category of Meals and General Entertainment Expenses and those spending limits. Management should not approve payment beyond the limits.
- **Is it appropriate for GW to pay for meals when only GW faculty and/or employees are present?** In most cases the answer is no.
- **If attendance is dependent on food, is the material/format appropriate or up to the standards that support the level of excellence GWUMC is noted for?** Non-student events should be few. Expectations for any event, including student events, are that the menu shows good stewardship of tuition funds.
- **Is the mode of travel the most economical?** Travel plans based solely on bonus point incentive plans are not appropriate. Every opportunity should be taken to secure the least costly itinerary possible.
- **Are transactions related to Sponsored Research governed by the limits, is the approver insuring that no alcoholic beverages are included in the meals?** Any use of sponsored research dollars should be carefully reviewed by the approver to insure that all relevant rules are being followed in accordance with University and Medical Center policies including the policy matrix as well any specific provisions in Sponsored Research Project agreements which are more limiting or require additional documentation.

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