

Group Gatherings

Resources:

- Section 07-03.04 Forms and Instructions for [Exemption form](#) Section 16 Forms,
- 16-07 [Purchasing Forms](#)
- See also Section 12 Travel, 12-01.00 [Travel Per Diem Rates](#)
- [State Caterer list](#) by area
- Section [07-03.03 Retirement](#) and [Section 07-03.02 Employee Recognition](#)
- [State Travel](#) “FindIt” guide
- [Section 07-04.00 Purchasing Card](#)

Purpose:

This policy establishes the policy and procedures to follow to acquire accommodations and meals for group gatherings. This policy applies to all court-sponsored group gatherings. This policy does not apply to retirement functions.

Definitions:

Group Gatherings includes court-sponsored conferences, training sessions, board meetings, and management planning meetings. *Accommodations* may include meeting rooms and related equipment rentals, sleeping rooms, and food.

Policy:

1. Costs for swearing in ceremonies are outlined as follows:
 - a. Refreshments
 - i. Judges \$350 (District expense)
 - ii. Commissioners \$150 (District expense)
 - b. Invitations
 - i. Judges \$150 (AOC Public Information expense)
 - ii. Commissioners \$75 (District expense)
2. Court funds should not be used to purchase refreshments when employees leave employment other than for retirement.

Procedure:

Court Sponsored Conferences or Training Sessions**

1. If the facility providing accommodations accepts state per diem rates for food and lodging, no further bids are required
2. If the facility selected by the department/district does not accept state per diem rates for food and/or lodging, then the following policy applies:
 - a. If the total cost of the group gathering is estimated to be \$1,000 or less, the department/district may select the best source without seeking competitive bids.
 - b. If the total cost of the group gathering is estimated to cost from \$1,000.01 to \$5,000 then the department/district must get two, preferably three bids from other comparable facilities and select the facility with the lowest bid. If the department/district cannot get more than one bid then the department/district must obtain approval from AOC Purchasing.
 - c. If the total cost is estimated to be greater than \$5,000 then AOC Purchasing will conduct the procurement.
3. Departments/districts must follow the current in-state lodging policy if lodging is included. (See the Lodging Policy in the Travel Section).
4. State per diem rates are to be used for food provided at court-sponsored conferences.
5. The following guidelines are for group gatherings that do not require an overnight stay or that do not last an entire day:

Meals provided for group gatherings starting and ending by:

Starting by:	and Ending by:	Qualified Meal/Snack
8:00 AM	11:00 AM	Breakfast and/or AM Break
9:00 AM	12:00 PM	AM Break**
11:00 AM	2:00 PM	Lunch*
1:00 PM	4:00 PM	PM Break**
4:00 PM	7:00 PM	Dinner (see paragraph 5c)

*A meeting held during the noon hour (12:00 PM–1:00 PM) with a duration of at least 3 hours will qualify for a lunch.

**Meetings with durations greater than 3 hours may qualify for a meal and a break. For example, a meeting that began by 9:00 AM and continued until 2:00 PM would qualify for an AM break and lunch.

- a. To be entitled to a refreshment break the meeting/training must be a minimum of three hours in length.

- b. Refreshments or light meals may be provided for CASA volunteer meetings/trainings.
- c. To be entitled to dinner, the function must have structured group interaction or activities such as speakers, presentations, or awards during the meal. As always with any meetings when meals are provided, an agenda and list of attendees must accompany the invoice when making a payment request.
- d. When possible, meetings and functions will be scheduled for times that do not include meal periods. Agendas will allow breaks sufficient to accommodate individual meals. Group meals will not be provided unless necessary for the effective conduct of business.

Board Meetings, Management Planning Meetings and other official meetings

- e. As Judges can normally only be away from the bench between noon and 2:00 p.m., the lunch meal starting time in policy 5 above is suspended when a judge must attend a court meeting. Lunch may be provided at meetings of the Judicial Council, Supreme Court, Boards of Judges, Judicial Council Standing Committees and Task Forces.
- f. Food and beverages may be provided at meetings within a judicial district of judges or judicial employees, called by the Presiding Judge or Court Executive, if the meeting agenda includes meal period as noted in 5 above.
- g. When non-judiciary attendees are present at regularly scheduled meetings sponsored by the Administrative Office during qualified meal periods, food and beverage may be provided. Districts that desire to provide food or beverage for functions that include non-judiciary attendees must obtain written approval of the Deputy Court Administrator.
- h. Requests for payment of food and beverage expenses for all meetings and functions must have attached:
 - i. copy of the agenda or program (reflecting start and end time), and;
 - ii. a list of attendees
 - iii. copy of authorization when required
- 6. Departments/districts are encouraged to hold the group gathering at a state-owned facility. If lodging is paid by the State, regardless of the source of funds:
 - a. The gathering must be held at a facility or location within the state unless in conjunction with a pre-approved function such as the State Bar Conference.
 - b. The gathering should be held at a location that is within 50 miles of where the majority of the attendees work. However, annual and court level conferences and management planning sessions may be held at a location more than 50 miles from where the majority of the attendees work.
 - c. Attendees traveling to a gathering less than 50 miles in excess of their normal office commute are not entitled to lodging reimbursement. However, if it is necessary to have an attendee at a group gathering site before or after the conference hours to perform administrative or training

duties, that attendee may be lodged even if they are traveling less than 50 miles in excess of their normal office commute.

- d. For each 8 hours of meeting time, one night of lodging may be reimbursed. However, for attendees who work more than 150 miles from the gathering site, one additional night of lodging may be reimbursed to allow for travel to or from the gathering.
- e. Occasionally, in the judgment of a Court Executive or State Level Administrator, the nature or circumstances of a group gathering may warrant an exception to this section that addresses lodging. In those instances, the State Court Administrator or Designee may approve an exception. Exceptions must be justified in writing on the "[Group Gathering Exemption](#)" form. Court Executives or State Level Administrators are responsible to ensure any exception is necessary and reasonable and in the best interest of the state. The funding source of a group gathering is not a valid reason for granting an exception.
- f. Supporting documentation for payments for group gathering accommodations must include the following:
 - i. Original invoices
 - ii. Agenda (reflecting start and end time) & List of attendees
 - iii. Copy of signed contract
 - iv. Group Gathering Exemption form, when required

****Gratuity** of up to 22% of the value of the food purchased may be added to the allowed State per diem rate. The tip should be calculated prior to the addition of taxes or the delivery fee. If a delivery charge is added, the tip should not exceed 10%.