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I. POLICY SUMMARY

There are occasions on which judicious extension of hospitality is in the best interest of the University of California (UC). It is essential that the expenditure of UC funds for entertainment be prudent, in keeping with accepted standards of the educational community, and compatible with UC's status as a tax-supported institution. This policy governs the manner and extent to which UC may extend hospitality in the form of meals and entertainment.

II. DEFINITIONS

III. POLICY TEXT

A. When Entertainment is Appropriate

Whenever UC acts as host, the occasion must, in the best judgment of the approving authority, be of significance in the UC affairs and not of the type that the responsible individual would normally undertake in a personal rather than an official capacity. As a guide in reaching this decision, the approving authority must evaluate the importance of the event in terms of the costs that will be incurred, the benefits that are anticipated from this expenditure, the availability of funds, and the alternatives that would be equally effective in accomplishing the desired objective. Occasions for which the expenses of official entertainment meeting this multiple standard may be approved include but are not limited to the following:

1. When UC is host or sponsor of a meeting of a learned society or organization, the costs of meals or light refreshments may be defrayed by UC.
2. When UC is host to official guests or to prospective appointees for positions requiring specialized training and/or experience of a professional, technical, or administrative nature, the costs of meals or light refreshments may be defrayed by UC.

An official guest shall be defined as a person not otherwise employed or compensated by UC who renders a service to UC and/or is present at UC at the invitation of or as a guest of the person authorized to approve the expenditure.

3. When meetings of an administrative nature are held that are directly concerned with the welfare of UC, the costs of meals or light refreshments may be defrayed by UC. Where meals are involved, they must be a necessary and integral part of the business meetings, not a matter of personal convenience. Normally meals at meetings should be included as part of the travel reimbursement. Only when they are a necessary part of the meeting and have been included in the agenda and approved in advance will meals be paid on a group basis.

4. When meetings amongst faculty or administrators are held, the costs of light refreshments may be defrayed by UC.

B. Approval of Entertainment Expenditures

Approval of expenditures for official entertainment in accordance with established maximum allowances must be obtained from the appropriate authorized individual in advance of making commitments. Approval of entertainment specified in I.B. and C. above is delegated to Regional, Special Program and County Directors when such expenditures are to be charged to funds under their control.

C. Meal Allowances

The per-person meal expenditures for persons being entertained and for UC employees as official hosts or participating at the request of the official host shall not exceed the per-meal allowances set forth in UC policy (reference [Appendix A](#)). The Associate Vice President, Assistant Vice President, or Controller may approve per-meal expenditures in excess of these maximums provided that State appropriations are not being used and provided there is appropriate justification for the amount being claimed.

D. Source of Funds

Expenses for official entertainment may be defrayed from various UC funds sources, within the existing level of Supplies and Expense funds, and are subject to the above rules and the following general limitations:

| <u>Source</u> | <u>Limitations</u> |
|---------------------------------------|--|
| State Appropriations | No alcoholic beverages or tobacco |
| Non-State Funds | Observe restrictions, if any, on use of funds |
| Extramural (contracts & grants) funds | If specifically authorized in the contract or grant or agency policy and to the extent and for the purpose(s) authorized (Terms of an award cannot authorize an expenditure that is not in accordance with UC policy.) |

IV. COMPLIANCE / RESPONSIBILITIES

V. PROCEDURES

Official entertainment charges may be processed as a direct charge to an appropriate

account by any of the following means:

- A.** Official entertainment may be claimed for reimbursement on the appropriate form, supported by list of participants, reason for meeting, and appropriate supporting vouchers. Original receipts must be provided; Visa/MasterCard vouchers are not acceptable.
- B.** Official entertainment may be charged to UC when it is in connection with a meeting and the details have been cleared in advance.

VI. RELATED INFORMATION

- [UC Business & Finance Bulletin 79, Expenditures for Entertainment, Business Meetings, and Other Occasions](#)
- [UC Business and Finance Bulletin G-28 – Policy and Regulations Governing Travel](#)
- [UC Business & Finance Bulletin 74, Business Travel Accident Insurance](#)

VII. FREQUENTLY ASKED QUESTIONS

VIII. REVISION HISTORY

July 2017:

Format updated.