

Hosting A Morale Related Meal or Event

Host Role/ UCOP Policy BUS-79

ALL morale-related expenses are exceptional, requiring final approval from The SOM Dean's Office no matter the cost. Let your administrator know ASAP that you are planning to entertain. Your administrator will be able to tell you all the rules for morale meeting & entertainment expenses, let you know the best way to fund the event, and may even be able to help you plan the event.



1. Be sure to ask for itemized receipts for food & beverages. Just the credit card receipt is not sufficient.
2. Keep all other itemized receipts for non-food & beverage items.
3. Keep a list of all attendees noting their affiliation to UCSF, i.e., Employee, Business guest, or spouse.
4. Clearly describe the meal purpose with as few acronyms as possible.
5. If you exceed the per person limit, the justification must answer the question, "Why was it necessary or unavoidable to exceed the per person limit?"
6. If claiming for travel expenses to the venue keep those receipts also.
7. Attach other supporting documents like an invitation or flyer to the event, comparison quotes, etc.
8. Recommended rates for San Francisco are twice the tax and round up or 20% pre-tax

Allowable Reasons For A Morale Related Meal or Event	Allowable Attendees
Faculty/ Staff/ Resident Annual Events. For retreats see the Business sheets	<ul style="list-style-type: none"> • Non-UCSF Business Guest • UCSF Employees • UCSF Employees <p>*Pre-event exceptional approval is highly recommended when any personal guests attend an event. * See Reverse</p>
New Employee Welcome Event	
Employee (Single Member) Recognition	
Annual Holiday Event	
Farewell/ Retirement Event (must have 5+ years UC service) *	
Dept. Achievement Celebration *	
Employee (Group) Appreciation *	

Meal Type (Decided by the time of day the food is served and/or food type)	Non-Exceptional Per Person Max (Calculation includes : Food & Beverages, Tip, Tax, Labor, Delivery & Service Fees)	Exceptional Per Person Range – Requires Dean's Office Exceptional Approval Exceeding this range requires Chancellor's approval
Breakfast until 10:00 am	Up to \$31	\$31.01 to \$62.00
Lunch from noon to 1:30 pm	Up to \$54	\$54.01 to \$108
Dinner from 5:00 pm	Up to \$94	\$94.01 to \$188.00
Light Refreshments 10:00 am to noon & 1:30 to 5:00 pm	Up to \$22	\$22.01 to \$44.00
Non-F&B costs all meals	Up to \$100	\$100.01 +

If a reception before a meal includes beverages and hors d'oeuvres, the combined charges for the reception and the meal should be treated as a single event for purposes of calculating the per person costs.

Morale or Business – Definition

Morale events are primarily social and/ or recreational.

Business/ Programmatic events are in connection with meetings of employees and non-UCSF business associates to conduct official University business.

Insurance

For university-sponsored and organized events such as the fellowship graduation/ summer retreats etc., UC's general liability self-insurance program can provide coverage. The Certificate of Self-Insurance can be accessed at <https://rmis.ucsf.edu/> by clicking on the link for "UC Certificate of Insurance" and then clicking on the COI link on the page to which you will be directed.

Dept. Achievement Celebrations & Employee (Group) Appreciation

*** Allowable attendees:**

While allowable attendees are as listed, for the 3 event types asterisked (*), UCSF personal guests attending these events would be VERY unusual. For farewell and retirement events, only the departing employee, retiree, and host are allowed to bring personal guests. Pre-event exceptional approval is strongly recommended to be sought for other personal guests wishing to attend an event.

Justification Tips:

Why was it necessary or unavoidable to exceed the per-person limit?

- Why was that particular restaurant chosen?
- Was it difficult to locate a venue for such a large guest list?
- Could the meal only take place at lunch, but you wanted a dinner-style meal?
- Was the venue in a highly business or touristic-centric area?

Funding sources:

Federal & State Government fund sources do not allow for reimbursement of alcohol and the summary should show the allowability to use it for the event/ expenses.

Gift Funds – please confirm that the intent of the fund allows for Meeting And Entertainment expenses relating to the purpose of your event.

Timely Submission of Expense Report

All expense reports must be complete, accurate, and submitted within 45 days after incurring the expense to ensure timely reporting of expenses and to avoid potential IRS tax implications. After 60 days the expense will be considered as taxable income.