

SCHOOL OF SOCIAL WELFARE

THIS FORM WILL BE RETURNED TO YOU AFTER APPROVAL. PLEASE KEEP IT AND RESUBMIT IT ALONG WITH YOUR RECEIPTS AT THE TIME YOU REQUEST REIMBURSEMENT (OR VENDOR PAYMENT) AS PROOF OF ADVANCED APPROVAL.

Application for Approval of Entertainment Expense

- All Entertainment Expenses must have prior approval.
- See Policy on reverse side

\_\_\_\_\_  
TODAY'S DATE

Nature of Event, or Purpose of Meeting: \_\_\_\_\_

Date of Event: \_\_\_\_\_ Time of Event: \_\_\_\_\_

Location of Event: \_\_\_\_\_

Person in Charge (Host): \_\_\_\_\_

Number of Participants: \_\_\_\_\_ If less than ten, list names: \_\_\_\_\_

Source of Funds (Account Name & Account Number): \_\_\_\_\_

Food & Beverage Cost: \$\_\_\_\_\_ Cost Per Person: \$\_\_\_\_\_ Facility Cost: \$\_\_\_\_\_ Total Cost: \$\_\_\_\_\_

THE LIMITS BELOW ARE CALCULATED ON THE BASIS OF FOOD, BEVERAGES, TAX, TIP, AND HANDLING CHARGES; BUT EXCLUDES THE COST OF RENTING A FACILITY.

→ Does cost exceed per-person limits?  yes  no

Per-Person Limit

Breakfast: \$18.00  
Lunch: \$30.00  
Dinner: \$45.00  
Light Refreshments: \$12.00

If yes, state reasons and justifications: \_\_\_\_\_

If the event will be held at The Faculty Club or The Women's Faculty Club, will you charge expense to:

Personal Account \_\_\_\_\_  
Account Number

Group Account \_\_\_\_\_  
Account Number

All other locations:

out of pocket

charge card

UC Advanced Deposit

Will alcoholic beverages be served?  yes  no

→ If yes, the form "Notice of Event at Which Alcoholic Beverages will be Served" must accompany this application.

If yes, source of funds obtaining alcoholic beverages: \_\_\_\_\_

NOTE: Alcoholic beverages cannot be purchased on State or Federal Funds.

"I certify that the entertainment expenses are for official University purposes only."

\_\_\_\_\_  
Approval Signature: Dean, or Assistant Dean for Administration

\_\_\_\_\_  
Signature of Applicant

Date: \_\_\_\_\_

## **POLICY GOVERNING ENTERTAINMENT**

### Purpose

There are occasions in which the judicious extension of hospitality is in the best interest of the University. Expenses for entertainment must be directly related to, or associated with, the active conduct of official University business. In addition, the expenditure of funds for entertainment should be cost effective and in accordance with the best use of public funds.

### Kinds of entertainment

- When the University is host to official guests, invited visitors, University donors, employees visiting from another work location, or to members of the community, etc., the cost of meals or light refreshments may be reimbursed.
- When the University hosts or sponsors a meeting of a learned society or organization, the cost of meals or light refreshments may be reimbursed.
- When meetings of an administrative nature are held that are directly concerned with the welfare of the University, the cost of the meals or light refreshments may be reimbursed; but meals must be a necessary and integral part of the business meeting, not a matter of personal convenience, and the meeting should take place over an extended period of time.
- When meetings between faculty or administrators and students are held, the cost of light refreshments may be reimbursed.
- The cost of light refreshments may be reimbursed for receptions held in connection with conferences, meetings of a learned society or organization, fundraising events, meetings of student groups, employee recognition events (awards, service credit, retirement, etc., provided such functions are paid from unrestricted funds), and student events such as commencement exercises.

### Exceptional Expenses include:

- Employee recognition functions, holiday gatherings, tickets to sporting events, and entertainment of the spouse (or equivalent) of a host or guest. Reimbursement is not permitted for birthdays, weddings, anniversaries, farewell gatherings (other than retirement), Secretary's Day, etc.
- Instances when actual costs, which are unavoidable and necessary to achieve a University business purpose, exceed the authorized rates. Exceeding the rates is not in itself adequate justification for a higher reimbursement rate.

### Funding Source Restrictions

- Alcoholic beverages or tobacco purchases may not be charged to Federal or State funds. Expenses must be specifically authorized in the contract or grant, or within the restrictions of other University controlled funds.

### Per-Person Limits

Breakfast	\$18.00	Dinner	\$45.00
Lunch	\$30.00	Light Refreshments	\$12.00

The above amounts include tax and gratuity, but exclude room rental.

The official host must certify that the entertainment expenses were incurred for official University business purposes. The reimbursement request (Form U5-IE) must specify the type of expense, type of event, number of participants with guest list, the date and location of the event, the nature or purpose of the meeting, and the name of the official host and department.

***In the School of Social Welfare, entertainment expenses must have prior Dean's Office approval.***