



HOSPITALITY POLICY – FOUNDATION FUNDS

Objective

These procedures fulfill the requirement of the CSU Hospitality Policy that "each campus and its auxiliaries are required to develop written procedures, consistent with this policy, regarding the payment of ordinary and necessary hospitality expenses."

Per the California State University (CSU) Hospitality Policy and the Chancellor's Office (CO) Hospitality Policy, CSUB Foundation hospitality expenses may be paid to the extent that such expenses are necessary, appropriate to the occasion, reasonable in amount and serve a purpose consistent with the mission and fiduciary responsibilities of the CSU Foundation.

The CSUB Foundation funds follow the CSUB Hospitality Policy with the modifications and exceptions detailed below. Expenses for hospitality must be directly related to, or associated with, the active conduct of official university or CSUB Foundation business.

When a university employee or official acts as an official host, **the occasion must, in the best judgment of the approving authority:**

- Serve a clear University or Foundation / University Advancement business purpose;
- With no personal benefit derived by the official host, other university employees, or University Advancement officials;
- The expenditure of funds for entertainment should be cost-effective and
- Be in accordance with **the best use of public and philanthropic funds.**

Procedures Statement

CSUB Foundation Hospitality Procedures differ from the [CSUB Campus Hospitality Policy](#) in the following areas.

- Foundation hospitality expenses charged by **University Advancement (UA) employees:**
 - Do **not** require a Hospitality Justification Form and
 - Do **not** need to follow monetary limits but should be in accordance with the best use of public and philanthropic funds.
- **Non-UA employees** must submit the Hospitality Justification Form for the VP of University Advancement's approval.
- Although reasonable alcohol expenditures are allowable, these should be appropriate to the business purpose. They should consider sober working conditions and public perceptions, especially during the regular workday (i.e., lunch).
- See approval procedures on the next page.

Employee Morale and Recognition

The CSUB Hospitality Policy allows employee recognition expenses based upon exceptional contributions, length of service, or morale to be paid from Foundation funds. These expenses must be:

- Reasonable in amount
- Infrequent, and
- Approved by the Vice President of University Advancement.

Retirement and Farewell Gatherings

Gatherings to recognize the service of employees retiring or otherwise voluntarily separating from the University with at least 5 years of CSU service are allowable. These gatherings should offer light refreshments as opposed to a meal.

- Events should be planned through the [Events Office](#) and
- Catering services should be ordered on a requisition through [Procurement](#).
- To avoid facility charges, the gatherings should be held at CSUB except when it is not practical to do so.
- Total expenses for the gathering (including light refreshments, decorations, etc.) shall not exceed \$500.
- Any gift for the departing employee should be funded through personal contributions, not paid with University or Foundation funds.

Division Holiday Gatherings

The Vice President of University Advancement may host divisional holiday gatherings using Foundation funds; Expenses for these gatherings must be reasonable and should not include fully catered meals; To avoid facility charges, the gatherings should be held at CSUB except when not practical to do so.

Approval of Transactions

The Vice President of University Advancement must approve all Foundation hospitality expenses, and his/her approval signifies the expenses meet this policy.

Additional approvals are required for the following expenses:

Approving Authorities (other than the Vice President)

- An employee may not approve their own expenses or the expenses of their supervisor;
- An employee may not approve requests for which they are the Official Host;
- Hospitality expenditures for a spouse, domestic partner, or significant other of an employee;

Vice President

- If the Vice President of University Advancement is the Official Host or is submitting paperwork for their own expenses, an approval from one of the following is required:
 - The Vice President of Business & Administrative Services (BAS) or
 - The Associate Vice President of Business and Financial Services.

Other Expenses

Any hospitality expenses not addressed in this policy must follow [The CSUB Campus Hospitality Policy](#).

Changes

4/17/24: References to BMAF changed to Hospitality Justification Form

4/17/24: Added that non-UA employees **do** need to submit a Hospitality Justification form with the UA VP's signature of approval. Only UA employees are exempt from that requirement.