Hospitality Policies
What is a hospitality expense?

- Meals
- Events
- Gifts
When is a hospitality expense reimbursable?

- Directly related to, or associated with, the active conduct of official University business.

- Serves a clear University business purpose, with no personal benefit derived by the official host or other university/campus employees.

- Cost effective and in accordance with the best use of public funds.
Host to Official Guests

- Visitors from other universities
- Members of the community
- Visiting dignitaries
- Donors (prospective donors, alumni)
- University employees visiting from another work location
Meal with Donors
Maximum Reimbursement Rates for Hospitality (Includes tax and tips)

- Breakfast $20.00
- Lunch $30.00
- Dinner $50.00
- Light Refreshment $15.00

*Tip: 15% recommended, 20% max*
Meal with Donors

• Detailed Receipts Required
  o Credit card statement not sufficient
    ▪ Prevent additional time required to obtain receipt
      ❖ Call restaurant
      ❖ Write memo
      ❖ Request exception
Alumni/Donor Cultivation Events

- The cost of meals or light refreshments may be paid or reimbursed when the University hosts an event for the purpose of generating the goodwill of prospective donors.
Events checklist

✔ Submit contract to Thao or Alu for review
  ✔ Before invitations are mailed
  ✔ Budget check
  ✔ Verify source of funding
  ✔ Secure necessary signatures
  ✔ Review out of pocket expenses

✔ Obtain Insurance

✔ Obtain alcohol clearance if serving alcohol
Event Contracts: On Campus Vendors

Required Signatures: **Senior Staff**

- Chartwells, Vista Room, Cesar Chavez vendors
Event Contracts: Off Campus Vendors

Required Signatures

• Stephen Smith – CSU funding
• Jason Porth – U. Corp funding
  o Authorized to commit the university/U. Corp to pay event related debt.
  o Unauthorized signers will be held liable for cost of event.
Maximum rates for reimbursement

Exception to maximum rate allowable is possible.

• Reasons for exception:
  o Location: NY, DC, international events higher costs
  o Limited number of restaurants available in the area

• Requires VP approval, prior to event

• Jason Porth’s approval also required for events funded by U. Corp
  o https://ucorp.sfsu.edu/global_docs/forms/allforms/exception_form.pdf
**Maximum reimbursement rates for events**

- Breakfast $20.00, Lunch $30.00. Dinner $50.00. Light Refreshments $15.00

- Meal category determined by menu, not necessarily the time of meal.
  - Example: Appetizers at 7:00 P.M.: $15/max per person
GIFTS

- Presented to non-University individuals or organizations when the gifts are made on behalf of the University.
- Must be able to demonstrate that the gift benefits the University or is clearly necessary to the University's fulfillment of its role as a good community citizen.
- To avoid any appearance of favoritism, no officer or employee should present a gift that appears to be offered because of the position held by the recipient.
Gifts Presented to Non-Employees

- Presented to non-University individuals or organizations when the gifts are made on behalf of the University.
  - Appreciation
  - Get well
  - Sympathy gifts
  - Promotional
- Non-CSU funding only: limited funding
- Must be able to demonstrate that the gift benefits the University or is clearly necessary to the University's fulfillment of its role as a good community citizen.
- To avoid any appearance of favoritism, no officer or employee should present a gift that appears to be offered because of the position held by the recipient.
Gifts Presented to Non-Employees

• Maximum: $100

• Allowable Gifts:
  o Flowers
  o Gift cards
  o SF State promotional items
Gifts Presented to Non-Employees

• Not allowable:
Gifts Presented to Non-Employees

• May **NOT** be presented to the following:
  o University employees or relatives of University employees.

  o Any individual or organization associated either directly or indirectly with a political party, campaign, or candidate, or a group engaged in an attempt to influence legislation, elections, referendums, or the like.

  o Any person with whom a presenter has an outside business relationship, i.e., where any conflict of interest exists.
Gifts Presented to Employees

• Recognition of service
  o Minimum of 5 years of service
• Retirement gift
• Maximum: $250
  o Service Awards
  o Flowers
  o Gift cards
  o SF State promotional items
Gifts Presented to Employees

Prohibited Expenses

Expenses that are of a personal nature and not related to the active conduct of official CSU business will not be reimbursed.

Examples:

- Employee birthdays
- Weddings
- Anniversaries
- Baby showers
Meetings

• *Must be a necessary and integral part of the business meeting, not a matter of personal convenience.*

  Examples:
  o Advancement meeting with President Wong

• Reimbursement will *not* be allowed when two or more employees from the same work location (University Advancement) choose to go to lunch together to continue their business as *an incidental* part of the meal, or when the meeting could have been scheduled during regular working hours.
  o Cannot be reimbursed from CSU funds, limited funding available.

• Allowable for meals during meetings with employees outside of University Advancement are allowable, but should be limited to a few times each year.
Faculty/Staff Picnics, Holiday Gatherings, and Parties

- May be paid or reimbursed, provided it can be demonstrated that such functions serve a University business purpose.
  - Example: Advancement retreat
- May **not** be paid or reimbursed from the CSU Operating Fund.
How do I get my reimbursement?

• Submit receipts and Request for Reimbursement Form
• U. Corp Hospitality Form: [https://ucorp.sfsu.edu/global_docs/forms/allforms/RequestForPaymentHospitalityREV0907.pdf](https://ucorp.sfsu.edu/global_docs/forms/allforms/RequestForPaymentHospitalityREV0907.pdf)
• Must submit within 30 days
• Required information:
  o Purpose of event
  o Number of guests
    ▪ Less than 25 guests, requires names of each guest and relationship to the university
    ▪ Copy of invitation/flyer
Hospitality While On Travel Status

• Should be documented on the “Request for Payment/Reimbursement of Hospitality Expenses”

• Should be submitted with the Travel Expense Claim to ensure that the meals for hospitality are separately justified from the meals for travel.

A per diem meal must not be added to the travel expense form when a hospitality expense for the same meal has been submitted for reimbursement.
Where’s my reimbursement?

• Two to four weeks to process
  o Longer if an exception is required or missing documentation

• Check will be mailed to your home unless you request to pick up on campus.