



Hospitality Policy and Procedure – Foundation Funds

1. PURPOSE

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 following modifications and exceptions. Expenses for hospitality must be directly related to, or associated with, the active conduct of the 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 official.
- The expenditure of funds for entertainment should be cost-effective.
- Be in accordance with the best use of public and philanthropic funds.

2. PURPOSE

CSUB Foundation hospitality procedures differ from the [CSUB Hospitality Policy and Procedure](#) in the following areas:

- Foundation hospitality expenses charged by University Advancement (UA) employees using Foundation funds do not require the following:
 - A Hospitality Justification Form
 - Do not need to follow monetary limits but should be in accordance with the best use of public and philanthropic funds.
- Non-UA employees follow the [CSUB Hospitality Policy and Procedure](#).

Approval of Transactions

Approving Authority (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.

Business Unit	University Advancement	All Other Divisions
BKFDN	<ul style="list-style-type: none">• Follow Foundation Hospitality Justification Policy & Procedure• No Hospitality Justification Form required (Event flyer or email required.)	<ul style="list-style-type: none">• Follow Hospitality Justification Policy & Procedure• Hospitality Justification Form required
All Other Business Units	<ul style="list-style-type: none">• Follow Hospitality Justification Policy & Procedure• Hospitality Justification Form required	<ul style="list-style-type: none">• Follow Hospitality Justification Policy & Procedure• Hospitality Justification Form required

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
- 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 five years of CSU service are allowable. The gatherings should offer light refreshments as opposed to a meal.

- Events should be planned through the [Office of Events](#).
- On-campus catering services should be submitted through P2P to Procurement.
- Total expenses for the gathering should 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. The events should be held at CSUB except when it is not practical to avoid facility charges.

Other Expenses

All other expenses not referred to in this policy must follow the [CSUB Hospitality Policy and Procedure](#).