**Bourns College of Engineering**

Pre-Approval Form

Entertainment and Business Meeting Expenses

It is essential that the expenditure of University funds for entertainment and business meetings be prudent and in a manner which is in keeping with accepted standards of the educational community and compatible with its status as a tax-supported institution. Some UC policies governing business/entertainment expenses that you should be aware of:

1) Please note that the meal breakdown isn’t automatic. **Detailed** r**eceipts MUST accompany all claims over $75 to be reimbursed.**

1. Breakfast, Lunch, and Dinner business meetings, with advance prior approval from the appropriate office, can be claimed provided that: a) The meeting must be for the purpose of discussion; b) An alternative meeting time is not possible; and c) ***Number of UC personnel in attendance must have a documented, substantial, and bona fide business purpose.***.
2. Entertainment expenses may be claimed from contracts and grants, gifts, or endowments, as well as from State (19900) funds. Note, however, that contract and grant policies may differ from that of the University’s. Please refer to the respective contract agreement for details.
3. Alcoholic beverages may ***not*** be purchased from State General Funds (19900) or Federal funds. Other fund sources may also have restrictions so please consult contract agreements for details. When calculating alcohol total be sure to include tax and tip.
4. Expenses for holiday parties, going away events (not retirements) department picnics, etc. are **not allowable**

|  |  |  |  |
| --- | --- | --- | --- |
| Today’s Date: |  | Date of Event: |  |
| Name: |  | Location of Event: |  |
| Phone: |  | Total Est. Cost | $ |
| Funding Source: |  (see 3 & 4 above)  |

Type of Event:

[ ]  1. Employee Recruitments [ ]  5. Meetings of an Administrative Nature

[ ]  2. Welcome Events [ ]  6. Conferences, Meetings of Learned Societies and

 Organizations

[ ]  3. Recognition and Awards Events [ ]  7. Development/Advancement Entertainment

[ ]  4. Other Academic Events & Occasions [ ]  8. Business Meeting (see note 2 above)

|  |
| --- |
| Justification: ------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------ |

**Please attach a list of all participants. Make sure to designate UC Participants and Non-UC Guests with titles or affiliations**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Account** | **Activity** | **Fund** | **Function** | **Cost Center** | **Project Code** |
|   **714140****(food and beverages)** |  |  |  |  |  |
|   **714160****(social activities & alcohol)** |  |  |  |  |  |

**Per Person Maximum rate: Breakfast $27, Lunch $47, Dinner $81 and Light Refreshments $19**

**Events that require exceptional approval: New Faculty Receptions, Faculty & Staff Recognitions, Dept/Unit Retreats, & Table Sponsorships.**