

Partners in Campus Business Operations

Business and Financial Services

Revisions to Hospitality Procedure and Forms

Sent on behalf of Bella Newberg, Director, Procurement, Contracts & Support Services

In order to be compliant with recent revisions to the CSU Policy

<http://www.calstate.edu/icsuam/sections/1000/1301.00.shtml>, regarding payment or reimbursement of Hospitality Expenses, the following will be implemented immediately:

- 1) Table 1 (Page 8 of CSU policy), previously referred to as “Hospitality Expenses Funding Matrix”, has been deleted, please reference Section 703, Table 1 of CSU Policy: <http://www.calstate.edu/icsuam/sections/1000/1301.00.shtml>.
 - a. **The new policy distinctly states that the 485 Operating Fund may not be used to pay for meals and light refreshments for meetings and events attended by only employees of the same work location. There will be no exceptions to this revision.**
- 2) Hospitality Form and Instructions have been revised (see attached).
 - a. The use of a Blanket Hospitality Form is no longer available. A separate Hospitality Form must be submitted for each event
 - b. Name of Official Host for events has been added
 - c. Additional information is required in the Event Attendee section
 - d. All Students (current and prospective), Recruitment Candidates, and Volunteers have been added to the Official Guest definition
 - e. Gifts, Awards and Promotional items require additional information
 - f. Fiscal Authority
 - i. If utilizing a Trust Fund, provide a copy of the Trust Agreement that states hospitality expenses are allowable.
 - g. Routing
 - i. The Hospitality Form must be completed and have all signatures prior to incurring any expenses. Any expenses incurred prior to final approval of the Hospitality Form may not be paid or reimbursed.
 - ii. If Utilizing Events and Conference Services, the requesting department must complete a Hospitality Form and obtain all signatures before any expenses are incurred for the event.

A procedure outlining the CSUSM approval of transactions and maximum per person rate for food is currently being drafted and will be released shortly. Additional information on Hospitality will be provided at the next PCBO Meeting on February 13, 2012.

Please direct any questions to procurementservices@csusm.edu and note "Hospitality" in the subject line or call Procurement, Contracts & Support Services at x4555.

Thank you.