TABLE 1. HOSPITALITY EVENT TYPE DEFINITIONS & EXAMPLES

Event Type	Definition	Examples
Award or Service Recognition	Events recognizing employees through a formally established, published award program or for milestone service anniversaries of **5 years or more**.	Employee of the Year awards, Excellence Awards, formal recognition programs, 5-year, 10-year, 15-year service award ceremonies.
Commencement	Events associated with graduation or completion of an academic program.	Graduation ceremonies, commencement receptions, hooding ceremonies, graduate receptions.
Entertainment Event	Events where entertainment is the primary purpose.	Concerts, theatrical performances, cultural performances, comedy shows, guest entertainment programs.
Farewell/Retirement Function	Events honoring an employee who is retiring or leaving the organization.	Retirement receptions, farewell luncheons, going-away celebrations.
Fundraising Event	Events intended to raise funds or solicit donations for a program, department, or organization.	Benefit dinners, donor galas, fundraising receptions, charity auctions.
Morale/Team Function	Events focused on employee engagement, appreciation, team building, or workplace morale.	Staff appreciation lunches, department holiday gatherings, team-building workshops, employee appreciation events.
Official Guest(s) Meeting	Meetings or events involving invited guests, dignitaries, external stakeholders, or official visitors conducting institutional business.	Guest speaker luncheons, board member visits, delegation meetings, VIP tours, partnership meetings.

TABLE 1. HOSPITALITY EVENT TYPE DEFINITIONS & EXAMPLES (Continued)

Event Type	Definition	Examples
Outreach Event	Events designed to engage, educate, or build relationships with the community or external audiences.	Community fairs, public information sessions, open houses, community engagement events.
Professional Conference/ Meeting	Professional or business-focused meetings, conferences, seminars, workshops, or training events.	Annual conferences, leadership retreats, professional development workshops, committee meetings, strategic planning sessions.
Recreational Event	Events centered on leisure, recreation, or social enjoyment, typically not tied to business objectives.	Staff outings, picnics, bowling events, family fun days, recreational excursions.
Sporting Event	Events involving athletic competitions or sports-related activities.	Tournaments, athletic competitions, sporting receptions, team competitions, game-day hospitality.
Student Event	Events primarily serving students that do not fit a recognition, recruitment, or commencement category.	Student workshops, orientation activities, student leadership events, student engagement programs.
Student Recognition	Events recognizing student achievements, accomplishments, leadership, or academic success.	Honor society inductions, scholarship ceremonies, dean's list receptions, academic achievement awards, student leadership recognition.
Student Recruitment	Events intended to attract and enroll prospective students.	Recruitment fairs, admitted-student receptions, preview days, campus visit events, prospective student information sessions.
Other	Events that do not clearly fit any of the categories listed. Use only when no other event type is appropriate.	Unique or one-time events requiring special review.

TABLE 2. GENERAL EXPENSE MATRIX

GENERAL EXPENSE TYPE: CATEGORY	FUNDING SOURCE				
Expenditures/Occasions	**All University CSU Trust/Operating Funds (Excluding 496)**	**Auxiliary Funds Must Comply with Auxiliary Procedures (85xxx per written agreement)**	**496 Misc. Trust Funds**	**Account Code**	**Changes**
Alcoholic Beverages, including tax, gratuity, and service charges.	No	Yes[3]	Per Written Agreement[5]	660927 or 660928	
Awards/Prizes and Service Recognition (e.g., minimum 5 years of service, or awards presented during an official activity).	Yes[2]	Yes	Per Written Agreement[5]	660944	
Bereavement Expenditures (e.g., flowers, plant, or card for employees or former employees only).	No	Yes	Per Written Agreement[5]	660846	
Community Relations/Outreach	Yes[4]	Yes[4]	Per Written Agreement[5]	Various	New category. No longer combined with Fundraising.
Donor Gifts – Gifts with the expectation of benefit or other bona fide business purpose.	No	Yes[2]	Per Written Agreement[5]	660846	
Employee Morale and Team-Building Events	Yes[1,6]	Yes	Per Written Agreement[5]	660820	
Fundraising	Yes[4]	Yes[4]	Per Written Agreement[5]	Various	New category. No longer combined with Community Relations.
Gifts for Personal Benefit (e.g., weddings, anniversaries, baby showers, get well, birthdays, and graduation gifts).	No	No	No	NA	

TABLE 2. GENERAL EXPENSE MATRIX (Continued)

GENERAL EXPENSE TYPE: CATEGORY	FUNDING SOURCE				
Expenditures/Occasions	**All University CSU Trust/Operating Funds (excluding 496)**	**Auxiliary Funds Must Comply with Auxiliary Procedures (85xxx per written agreement)**	**496 Misc. Trust Funds**	**Account Code**	**Changes**
Food and Beverage for business meetings, official guest meetings, events, and for employee-only meetings attended by official guests, employees from another campus, students, donors, individuals being recruited for employment, visitors, and volunteers. Meals for employees only must serve a bona fide business purpose, for example: working lunch.	**Yes**[1,6]	Yes[1]	Per Written Agreement[5]	660927 or 660928	Combined meal category for all allowable events. There is no longer a distinction between the meal type. The distinction is made by the attendee type.
Official Guest(s) Meetings, Business Meetings or Receptions-Meetings for recruitment candidates, students, donors, and meetings of other CSU-related groups.	**Yes**	Yes	Per Written Agreement[5]	Various	New Category to align with P2P and Concur.
Participation Incentives–research-funded survey or study, student participation in events.	**Yes**	Yes	Per Written Agreement[5]	660962	
Participation Incentives – other (Auxiliary funding only).	**No**	Yes[2]	Per Written Agreement[5]	660945	Account code change.
Professional Meeting, Conference or Reception- Meetings or receptions of learned society or professional organization. It does not include meetings or conferences of University-only or Auxiliary employees.	**Yes**	Yes	Per Written Agreement[5]	Various	Removed Business Meetings.
Promotional Items (when the occasion is appropriate)	**Yes**[6]	Yes	Per Written Agreement[5]	660962	
Recreational and Sporting Events	**Yes**	Yes	Per Written Agreement[5]	Various	New category that replaces Entertainment Events.
Student recruitment, student engagement, student recognition events-(subject to related policies/procedures such as the gift card purchasing procedures or student payment policy). Graduation gifts are not permissible.	**Yes**	Yes	Per Written Agreement5	Various	

TABLE 2. GENERAL EXPENSE MATRIX (Continued)

Foot Notes:

[1] Meals or light refreshments provided to employees may be permitted if the meal is integral to the business function, infrequent and modest. Meals or light refreshments (limited to no more than 12 times per year, per group) provided during an event may not exceed the maximum per person rate for:

- Breakfast: $40 per person
- Lunch: $60 per person
- Dinner: $90 per person
- Alcohol: $30 per person (Auxiliary organizations only)
- Light refreshments: $40 per person

These rates are inclusive of food, beverages, labor, sales tax, delivery fees, and other service-related costs. Gratuity should be reasonable and generally not exceed 20%.

[2] Cash and cash equivalent items such as a gift card and gift certificate, no matter how small, are always taxable to the employee. A non-cash award or prize may have a taxable consequence to the employee if it does not meet the IRS definition of de minimis and infrequent. **Refer to Section 14. Resources for IRS for tax rules**. Monetary awards paid to employees or student assistants must be made through Payroll.

All incentive and award distributions must be properly documented and tracked in accordance with CSU and campus requirements.

[3] Alcohol purchases for on campus events must follow the CSUSM Alcohol Use Policy. An Alcohol Approval Form must be submitted in addition to the Hospitality Form.

All alcohol-related expenses must demonstrate a clear business purpose and comply with CSU policy and applicable funding source restrictions.

TABLE 2. GENERAL EXPENSE MATRIX (Continued)

[4] Payment or reimbursement for attendance at a community relations activity or fundraising event must include documentation of the individual names, affiliations, and direct or indirect benefit(s) to the CSU to be derived from the expense.

Such documentation must clearly demonstrate the business purpose of the expenditures.

[5] Expense must be consistent with the original intent of the funding sources (revenue) as documented in the trust.

Where multiple funding sources or policies apply, the most restrictive provisions must be followed.

[6] For public relations and reputational considerations, the use of Auxiliary or non-state funding sources is preferred for employee-related hospitality expenditures, when appropriate and allowable.

Account Codes

- 660944 – Other Awards/Honors
- 660927 – Other Catering
- 660820 – Other Hospitality
- 660945 – Other Incentives
- 660928 – Other Non-Catering Food
- 660962 – Promo Items
- 660846 – SupSrv Gifts and Acknowledgements

TABLE 3. FOOD AND BEVERAGE PER PERSON LIMITS

Hospitality	Sub-Category	Maximum Per Person per Day[1]
Food and Beverage **(Includes catering, labor, sales tax, delivery fees, and other service fees)**	Breakfast	$40
	Lunch	$60
	Dinner	$90
	Alcohol[2]	$30
	Light Refreshments[3]	$40

[1] Per person limits include food, beverages, labor, sales tax, delivery fees, other service fees and gratuity (20% maximum). The reimbursement for a buffet reception cannot exceed the applicable meal allowance associated with the type of buffet (e.g., breakfast, lunch, or dinner).

[2] Auxiliary organizations only.

[3] Light refreshments include coffee and other beverages, snacks, hors d'oeuvres, pastries, cookies, crackers, chips, fruit, etc.

TABLE 4. APPROVALS

Hospitality Approvals	Comments
MPP	Assigned according to employee's position and where they work at the University. MPP may initiate and submit requests in Concur but must not approve transactions in which they are a participant or beneficiary.
Financial/DOA Approval	All hospitality requests and expense reports must be routed in Concur to an independent approver with valid Delegation of Authority (DOA) over the Chartfield. Routing is determined by department (stateside) or project (Foundation/Corporation).
Concur Pre-Approval (Hospitality Request)	Required for hospitality expenses when applicable. Must be completed and approved prior to incurring the expense. Approval must follow DOA routing and cannot be approved by an attendee or cardholder if a conflict exists.
Foundation- and Corporation-Funded Projects	Office of Sponsored Projects (for 85XXX projects). Finance Director or Designee (for 81XXX and 86XXX projects).
Independent Approval Requirement	Individuals may not approve their own expenses or those of their supervisor. Approvers must be able to exercise independent judgment and must not benefit (directly or indirectly) from the transaction.
Concur Expense Report Approval	All expenses submitted in Concur (including University card transactions) must be approved by an independent DOA approver. The cardholder/host cannot approve their own transaction.
Exception	PAT Member-Additional approval required from appropriate senior authority depending on the nature of the exception[1,2]
Documentation Requirement	All approvals must be supported by complete documentation in Concur, including business purpose, attendee list, receipts, and justification for any exceptions or alternate routing.

TABLE 4. APPROVALS (Continued)

FOOT NOTES

[1]**The President's Administrative Team (PAT)**

The President's Administrative Team (PAT) is comprised of the senior management team of the University as listed below:

- Provost & Vice President for Academic Affairs
- Vice President for University Advancement
- Vice President, Finance & Administrative Services and Chief Financial Officer
- Vice President for Student Affairs
- Chief of Staff
- Senior Director of Executive Communications
- Chief Diversity Officer
- Chief Enrollment Officer

VP FAS Hospitality Approval

VP FAS hospitality will be approved by the President's Chief of Staff.

Executive-level transactions must maintain independent approval and comply with CSU segregation of duties requirements.

[2]**Exception**

- Recreational and sporting events (including tickets for non-CSUSM events)
- A spouse or domestic partner of an employee

These exceptions require additional justification, documented business purpose, and elevated approval by a PAT member.

TABLE 5. SUPPORTING DOCUMENTATION

All hospitality transactions must include sufficient documentation to demonstrate a clear business purpose, reasonableness of costs, and compliance with CSU and CSUSM requirements. Documentation must be attached in Concur at both the request (pre-approval) and expense report stages, when applicable.

Event Type	Supporting Documentation
Meeting, Training, Workshop, Morale Events	• Agenda/Event Outline/Flyer • Attendee List (must be included in Concur or attached) • Catering Quote (**follow catering guidelines**) • Itemized cost per person calculation (inclusive of food, beverage, tax, service charges, and gratuity in accordance with CSU limits). • Business purpose justification clearly tied to University operations
Student Engagement	• Event Flyer/Invitation/Event Outline • Catering Quote (**follow catering guidelines**) • Itemized cost per person calculation (inclusive of all applicable charges). • Description of how the event supports student success or University mission
Participation Incentives (Research) and Student Participation in Events	• Approved Institutional Review Board (IRB) for research projects (if applicable) • Gift card supplier, number of gift cards, and denomination (if applicable) • If promotional item: supplier quote and First Right of Refusal from Bookstore (if applicable) • Participant eligibility criteria and tracking/log of distribution Documentation of business purpose and research activity
Participation Incentives (Other) - Auxiliary Funding Only	• Gift card supplier, number of gift cards, and denomination • If promotional item: supplier quote and artwork/logo • Business purpose and description of activity • Distribution log documenting recipients (or group), date and amount
Promotional Items	• Supplier quote for promotional item • Number of items being purchased • Cost per item • Artwork or logo • Business purpose and intended audience (e.g., donor relations, outreach) • Documentation demonstrating reasonable cost relative to benefit

TABLE 5. SUPPORTING DOCUMENTATION (Continued)

Event Type	Supporting Documentation
Awards and Prizes	• Documentation of award program (published on CSUSM website) • Length of service of 5 or more years (if applicable) Quote for award being given • First Right of Refusal if not purchased from Bookstore • Defined eligibility criteria, selection process, and award amount • Payroll or Financial Aid coordination when applicable (tax/reporting compliance)
Gift Cards	• Gift card supplier, number of cards, denomination • Justification for use of gift cards vs. non-cash alternative • Compliance with **CSUSM Gift Card Procedures**
Hospitality During Travel	• Approved Concur Hospitality Request (if required) • Clear distinction from travel meals/per diem • Attendee list and business purpose • Itemized receipts • Expense must be mapped to hospitality expense type in Concur
Blanket Hospitality	• Supporting documentation must be provided for each event included in the blanket request, including business purpose, estimated attendees, cost estimates, and event details. Final expense reports must include actual documentation (attendees, receipts, and reconciled costs).

TABLE 6: ROLES AND RESPONSIBILITIES

Role	Responsibility
Requestor/Submitter	• Certifies expenses are necessary, appropriate to the occasion, reasonable in amount and serve a purpose consistent with the mission and fiduciary responsibilities of the University. • Confirms the expense is allowable per the CSU Hospitality Policy, CSUSM Hospitality Guidelines and applicable policies, procedures, and guidelines. • Attaches required supporting documentation (see Table 5). • Ensures a clear and documented business purpose is included in the Concur request and expense report. • Submits Hospitality Request (pre-approval) in Concur when required, prior to incurring the expense. • Confirms appropriate approving authorities are in the routing workflow. • Ensures routing avoids conflicts of interest (e.g., removes themselves or other attendees from approval roles).
Approving Authority (Fiscal Authority/ PI/Designee)	• Ensures funding is available. For 85XXX projects, ensures the business purpose meets the objectives of the sponsored project scope. • Independently reviews and approves transactions to ensure compliance with CSU policy and appropriate use of funds. • Confirms expense is reasonable, necessary, and directly related to official University business. • Ensures they are not approving transactions where they have a personal or incidental benefit.
Approving Authority (Including PAT Member if Exception)	• Further substantiates expenses are necessary, appropriate to the occasion, official activities, reasonable in amount, and serve a purpose consistent with the mission and fiduciary responsibilities of the University. • Confirms the expense is allowable per CSU Hospitality Policy, CSUSM Hospitality Guidelines, and applicable policies. • Confirms appropriate approvers are in the routing. • Provides elevated review and approval for exceptions • Ensures justification for an exception is documented in Concur.
Corporation/Sponsored Projects (OSP/Finance Director/Designee)	• Confirms funding is available and expense is allowed per the award/program terms and conditions and other applicable regulations. • Ensures compliance with sponsor requirements and CSU hospitality restrictions. • Verifies that expenses align with project scope and funding restrictions.

TABLE 6: ROLES AND RESPONSIBILITIES (Continued)

Role	Responsibility
All Reviewers/Approvers in Workflow	• Approves/denies the Hospitality form in a timely manner. • Denies requests not directly related to official University business. • Ensures Concur workflow integrity by verifying appropriate routing, including use of alternate or ad hoc approvers when conflicts exist. • Confirms supporting documentation is complete and sufficient for audit purposes.
Accounts Payable	• Reviews for compliance with CSU Hospitality Policy and CSUSM Hospitality Guidelines. • Verifies appropriate approvers and fiscal authority (per CSUSM Hospitality Guidelines – verifies highest level of responsibility). • Ensures appropriate supporting documentation is submitted. • Ensures the Blanket Hospitality form submitted is an appropriate use of blanket form.
Travel Office	• Reconciles expenses with Travel Claim. • Ensures hospitality expenses incurred during travel are properly categorized and do not duplicate travel meals or per diem reimbursements. • Confirms hospitality expenses are supported by an approved Concur Hospitality Request when required.