

# MyEvents: A Focus on Celebrating Events



By: Sali Coleman  
La Shon Smith  
Nancy Herbst

**Beverly Randez**

# First, a few things to consider...

| Blink  |  | MyMeetings & Hosted Events |               |
|--|--|----------------------------|---------------|
| MYMEETINGS & HOSTED EVENTS » EXISTING REQUESTS |  |                            |               |
| <b>STEP 1: EVENT TYPE</b>                      |  |                            |               |
| <b>Document Reference Number</b>               |  |                            |               |
| Event Type                                     | Celebrating  |                            |               |
| Business Purpose                               | Employee morale group event, holiday party, picnic |                            |               |
| <b>STEP 2: EVENT INFORMATION</b>               |  |                            |               |
| Event Date                                     | 12/17/2010   |                            |               |
| Event Location                                 | Birch Aquarium at Scripps                          |                            |               |
| Event Status                                   | Complete   |                            |               |
| Event Description                              | Department   | Holiday Celebration        |               |
| Alcohol expense claimed?                       | N  |                            |               |
| <b>STEP 3: GUESTS</b>                          |  |                            |               |
| Participant Count                              | 275  |                            |               |
| Did a spouse or partner attend the event?      | N  |                            |               |
| Participant list                               | <a href="#">View participant list</a>              |                            |               |
| <b>STEP 4: PAYMENT</b>                         |  |                            |               |
| <b>Payment type</b>                            |  |                            |               |
| Dinner Expense Amount                          |  |                            | 17232.82      |
| Cost per person is 62.66                       |  |                            |               |
| Total Expense Amount                           |  |                            | 17232.82      |
| Payee Name                                     | THE FRENCH GOURMET, INC.                           |                            |               |
| Payee ID                                       | 00063699E  |                            |               |
| Payee Address Type                             | QA   |                            |               |
| Message to payee                               | Payment for Invoice # 31649                        |                            |               |
| Ledger reference                               | Holiday  |                            |               |
| Receipt(s) / Invoice(s) attachment             | <a href="#">TheFrenchGourmet.pdf</a>               |                            |               |
| <b>STEP 5: ACCOUNTING</b>                      |  |                            |               |
| Distribution Amount                            |  |                            | \$17,232.82   |
| <b>Index</b>                                   | <b>Fund</b>  | <b>Account</b>             | <b>Amount</b> |
| SUR4114  | 60120A   | 637465                     | \$17,232.82   |

This, can become...

# First, a few things to consider...

... this.

WATCHDOG

## UCSD party details: Cream puffs, barquettes and Absolut

By Ashly McGlone 11:47 P.M. APRIL 11, 2012

PRINT SAVE COMMENTS 10

f  
Twitter  
Email  
10 COMMENTS

### Related

As tuition rose, so did university holiday parties

Drag show at Lips and more: SDSU party expenses

- Surgery department staff holiday event held at the Birch Aquarium at Scripps cost \$17,232.82 for 275 employees in 2010, and \$20,078.27 for

|     |            |
|-----|------------|
| 130 | Wine       |
| -   | Other Wine |
| 29  | Beer       |
| -   | Other Beer |

Document

Happy Holidays for Adam & Sarah

Rock Bottom Brewery  
La Jolla # 3374  
6900 Villa La Jolla Drive  
La Jolla, CA 92037  
858-450-9271

Family and Preventive Medicine department employees enjoyed seared ahi and cedar plank salmon in 2011 from Rock Bottom

Sampling of UCSD party reimbursements

325 employees in 2011, or about \$62 per person. Details on the food catered by French Gourmet in 2010 was not provided, but in 2011, attendees enjoyed artichoke fondue, hand carved turkey, maple smoked ham, roast beef, garlic mashed potatoes, apple stuffing, hosted beer and wine, and for dessert, buche de noel.

Brewery for \$1,544.46.

Document

UCSD party policy

- Research Affairs Office holiday luncheon in 2010 held at La Jolla's Piatti Ristorante and Bar cost \$1,455, or nearly \$56 per person; 26

# First, a few things to consider...

WATCHDOG

## As tuition rose, so did university holiday parties

UC San Diego and SDSU say staff recognition is essential

By Ashly McGlone 11:46 P.M. APRIL 11, 2012

PRINT SAVE COMMENTS 80

f  
Twitter  
Envelope  
80 COMMENTS

### Related

UCSD party details: Cream puffs, barquettes and Absolut

SDSU party expenses: Drag show at Lips and more

As San Diego's public universities scaled back enrollment, cut classes and hiked tuition in recent years, the institutions increased spending on end-of-year and holiday parties for staff, public records show.

The University of California San Diego spent \$247,996 on such celebrations in 2011, up from \$179,552 in 2010,

Document



Total end-of-year party and gift spending by public agencies in the last two seasons

DOWNLOAD XLS

|                    |        |
|--------------------|--------|
| 3 Tang Gin         | 22.50  |
| 2 GL CAS AVALON    | 19.58  |
| 2 Lp Cranberry     | 9.50   |
| 3 Absolut          | 25.50  |
| 2 Merq Premium     | 15.90  |
| 2 Arnold Palmer    | 7.00   |
| 1 GL CH HAWN SLH   | 11.50  |
| 2 Coke             | 5.90   |
| 2 Iced Tea         | 5.90   |
| 2 Hang Top Shelf   | 22.00  |
| 1 Diet             | 2.95   |
| 4 80 Carbage       | 60.30  |
| 3 Caffe            | 9.75   |
| 2 Hot Tea          | 8.50   |
| 4 Rustichella      | 39.96  |
| NEALS              |        |
| 22 Special Barquet | 880.00 |
| Change Tips        | 53.00  |

Up to 25 Family and Preventive Medicine department employees enjoyed top shelf margaritas, mixed drinks and food from Il Fornaio Cucina Italiana in 2010 for \$1,408.

NEWS

## UCSD SPENT \$248K ON HOLIDAY PARTIES IN 2011

Much of the fun was for medical staff, using patient fees

By Ashly McGlone 12:01 A.M. APRIL 12, 2012 Updated 8:47 P.M. APRIL 11, 2012

PRINT SAVE COMMENTS 0

f  
Twitter  
Envelope  
0 COMMENTS

San Diego State spent \$48,907 last year, up from \$36,907 in 2010. Spokesman Greg Block said the increase was attributable largely to the timing of a staff awards luncheon, which was held during the holiday season in 2011 but not in 2010.

UC San Diego officials said all party and recognition expenses were paid using funding sources other than state tax funds, such as donations, endowment earnings and hospital revenue.

San Diego State's events were also paid without state funds or tuition revenue, except for \$5,500 spent on Nov. 18, 2011, to partially rent out Viejas Arena for the 38th Annual Staff Awards Luncheon, officials said.

Officials at both institutions said the discretionary money spent on the parties, as such, could have been directed to scholarships or other priorities amid tuition hikes.

# First, a few things to consider...

## PHOTO

|                    |        |
|--------------------|--------|
| 3 Tanq Gin         | 22.50  |
| 2 GL CAB AVALON    | 19.58  |
| 2 Lg Cranberry     | 9.50   |
| 3 Absolut          | 25.50  |
| 2 Marg Premium     | 15.90  |
| 2 Arnold Palmer    | 7.00   |
| 1 GL CH HAHN SLH   | 11.59  |
| 2 Coke             | 5.90   |
| 2 Iced Tea         | 5.90   |
| 2 Marg Top Shelf   | 22.00  |
| 1 Diet             | 2.95   |
| 4 BQ Corkage       | 60.00  |
| 3 Caffè            | 9.75   |
| 2 Hot Tea          | 6.50   |
| 4 Rustichella      | 39.96  |
| MEALS              |        |
| 22 Special Banquet | 880.00 |
| Charge Tips        | 50.00  |

Up to 25 Family and Preventive Medicine department employees enjoyed top shelf margaritas, mixed drinks and food from Il Fornaio Cucina Italiana in 2010 for \$1,408.

# First, a few things to consider...

## TOTAL END-OF-YEAR PARTY AND GIFT SPENDING BY PUBLIC AGENCIES IN THE LAST TWO SEASONS

Source: U-T San Diego

1/2 < > 🔍

| AGENCY  | 10-11 party  | 11-12 party  | 10-11 gift   | 11-12 gift   | TOTAL        |
|---|--------------|--------------|--------------|--------------|--------------|
| University of California, San Diego           | \$179,551.93 | \$247,995.92 |              |              | \$427,547.85 |
| San Diego County                              | \$21,922.88  | \$20,217.75  | \$132,906.72 | \$123,906.00 | \$298,953.35 |
| Palomar Pomerado                              | \$47,180.89  | \$53,607.80  | \$0.00       | \$0.00       | \$100,788.69 |
| San Diego State University                    | \$36,907.30  | \$48,907.08  | \$2,500.00   | \$3,688.33   | \$92,002.71  |
| California State University, San Marcos       | \$30,597.00  | \$29,637.00  | \$1,908.00   | \$2,226.00   | \$64,368.00  |
| Tri-City Healthcare District                  | \$22,558.89  | \$25,059.78  | \$0.00       | \$0.00       | \$47,618.67  |
| City of Carlsbad                              | \$17,337.63  | \$20,434.86  | \$5,403.87   | \$671.40     | \$43,847.76  |
| San Diego Community College District          | \$8,249.15   | \$7,565.69   | \$7,891.52   | \$9,221.21   | \$32,927.57  |
| San Diego County Water Authority              | \$8,260.00   | \$4,048.70   | \$531.53     | \$10,478.67  | \$23,318.90  |
| Port of San Diego                             | \$6,556.40   | \$11,320.34  | \$0.00       | \$0.00       | \$17,876.74  |
| San Diego County Regional Airport Authority   | \$10,880.29  | \$6,375.37   | \$0.00       | \$0.00       | \$17,255.66  |
| Otay Water District                           | \$8,579.20   | \$8,652.02   | \$0.00       | \$0.00       | \$17,231.22  |
| Sweetwater Authority                          | \$5,090.66   | \$8,000.00   | \$0.00       | \$0.00       | \$13,090.66  |
| Olivenhain Municipal Water District           | \$3,840.60   | \$5,081.28   | \$2,082.60   | \$1,584.53   | \$12,589.01  |
| SDCERA  | \$2,195.50   | \$1,507.75   | \$3,610.00   | \$1,605.00   | \$8,918.25   |
| Padre Dam Municipal Water District            | \$4,215.37   | \$3,635.53   | \$0.00       | \$0.00       | \$7,850.90   |
| City of Encinitas                             | \$3,003.63   | \$4,431.86   | \$175.00     | \$0.00       | \$7,610.49   |
| City of San Diego                             | \$1,293.79   | \$1,427.98   | \$1,425.00   | \$2,850.00   | \$6,996.77   |
| Helix Water District                          | \$1,001.00   | \$1,093.00   | \$1,130.00   | \$1,855.00   | \$5,079.00   |
| San Diego Metropolitan Transit System         | \$1,971.09   | \$2,699.14   | \$0.00       | \$0.00       | \$4,670.23   |
| Chula Vista Elementary School District        | \$716.28     | \$1,334.00   | \$1,158.25   | \$862.50     | \$4,071.03   |
| Grossmont-Cuyamaca Community College District | \$2,107.71   | \$1,349.58   | \$0.00       | \$0.00       | \$3,457.29   |
| Palomar Community College                     | \$1,359.38   | \$1,400.48   | \$0.00       | \$0.00       | \$2,759.86   |
| San Diego Association of Governments          | \$1,958.17   | \$0.00       | \$0.00       | \$0.00       | \$1,958.17   |
| Sweetwater Union High School District         | \$1,427.34   | \$0.00       | \$183.50     | \$129.38     | \$1,740.22   |
| City of Chula Vista                           | \$961.29     | \$421.64     | \$0.00       | \$0.00       | \$1,382.93   |
| MiraCosta Community College                   | \$0.00       | \$0.00       | \$500.00     | \$500.00     | \$1,000.00   |
| Vallecitos Water District                     | \$390.14     | \$299.06     | \$0.00       | \$0.00       | \$689.20     |
| Lakeside Fire Protection District             | \$16.99      | \$150.85     | \$513.30     | \$0.00       | \$681.14     |
| North County Transit District                 | \$428.39     | \$136.00     | \$0.00       | \$0.00       | \$564.39     |
| Southwestern College                          | \$322.05     | \$0.00       | \$0.00       | \$0.00       | \$322.05     |

**Sali Coleman**  
**La Shon Smith**

# Policy considerations for Celebrating Events

## Step 1: Event Type



### Event Type

#### What is the nature of this Event?

Please select the business nature for the event from one of the seven types.

Clicking on the nature of an event will automatically move you onto the next screen.

Click the "See categories" link to help you determine if the Event Type you are considering is the best choice.

- HOSTING Guests, Functions, [See categories](#)
- MEETING Employees, others. On UCSD Premises, [See categories](#)
- CELEBRATING Employee Appreciation, Morale, [See categories](#)
  - Appreciation, recognition, length of service
  - Employee morale group event, holiday party, picnic
  - Retirement, farewell
  - [See examples](#)
- ATTENDING Community Events, Fundraising, [See categories](#)
- EXTENDING Hospitality, [See categories](#)
- PROVIDING Work, Program Related Meals, [See categories](#)
- SPONSORING Student Events, Occasions, [See categories](#)

Celebratory events for employee appreciation and morale, including department holiday celebrations, are considered “Special Entertainment.”

# Policy considerations for Celebrating Events

## Step 2: Event Information

1 Event Type   2 Event Information   3 Guests   4 Payment   5 Accounting   6 Approvals   7 Review & Submit

---

### Event Information

Event Date:

Event Location:   
If on campus: Name of building; If off campus: Name of venue

Event Description:   
Please describe what took place and add any extra information you might want to include. If this is one of multiple payments for a single event, other than a deposit and final payment, please include a reference to the other(s).

Business Purpose for Celebrating

- Appreciation, recognition, length of service
- Employee morale group event, holiday party, picnic
- Retirement, farewell

---

### Alcohol

Alcohol was served so [fund-source restrictions](#) apply.

Will this request include an expense for alcohol?  Yes  No

Was alcohol served on UC property?  Yes  No

If alcohol is being served:

1. Fund restrictions may apply
2. PPM-510 form signed by the police department is required if the event was held on UC property

See "[Use of Alcoholic Beverages for a UCSD-Sponsored Event or Meeting](#)"

# Policy considerations for Celebrating Events

## Step 2: Event Information

1 Event Type   2 Event Information   3 Guests   4 Payment   5 Accounting   6 Approvals   7 Review & Submit

---

### Event Information

Event Date: 10/20/2013

Event Location: Bella Vista  
*If on campus: Name of building; if off campus: Name of venue*

Event Description: Department holiday party. This is one of three MyEvents. See also GAO0000321, GAO0000322, and GAA0000323. Attached is a budget of the anticipated cost for the event with the per-person cost expected at ~\$45.  
*Please describe what took place and add any extra information you might want to include. If this is one of multiple payments for a single event, other than a deposit and final payment, please include a reference to the other(s).*

Business Purpose for Celebrating:  
 Appreciation, recognition, length of service  
 Employee morale group event, holiday party, picnic  
 Retirement, farewell

---

### Alcohol

Alcohol was served so [fund-source restrictions](#) apply.

Will this request include an expense for alcohol?  Yes  No

Was alcohol served on UC property?  Yes  No

If more than one MyEvent is being processed for a single event, be sure to cross-reference the other event number(s).

When multiple MyEvents are required, also attach a 'general' budget so approvers can reasonably determine the anticipated per-person meal expense.

Don't forget that catering vendors must have a contract signed by Procurement and Contracts prior to the event and submitting them through MyEvents for payment.

# Policy considerations for Celebrating Events

## Step 3: Guests

1 Event Type   2 Event Information   3 **Guests**   4 Payment   5 Accounting   6 Approvals   7 Review & Submit

**Participant Information**

Is this a deposit?  Yes  No  
*If this is a deposit then you will not be required to enter a participant count or a participant list until the final payment is made.*

How many participants for this event?   
*If the participant list/count cannot be specified you may enter an estimate.*

**Participant List**

**i** A participant list is required for this event.

Participant List

Or

**Participant List Attachment**  No file chosen  
*You can attach a PDF, Word, Excel, or text file. If you are unable to attach, the alternative is to use a fax option and allow time for UCSD Travel to attach for you. [Access fax instructions.](#)*

**i** When participants also include a [spouse, partner, or family member for whom UCSD pays an expense](#), approval by the vice chancellor or designee will be required.

Does the participant list also include a spouse, partner, or family member for whom UCSD is paying for their expense?  Yes  No

What is the business purpose for the non-employee to attend?

Participant lists should include name, title and company affiliation. However, if all attendees are UC San Diego employees, the list may include just the names and a comment that all attendees are UC San Diego employees.

If family members are invited they must pay for their expense.

# Policy considerations for Celebrating Events

## Step 4: Payment



### Payment Information

- i** Payment type is direct payment to UCSD Travel Card.
- Payment will be made to US Bank for UCSD Travel Card owner chosen as the payee.
  - Payee must have an active UCSD Travel Card

**Payment Type**

Reimbursement to meeting coordinator  
 Payment to service provider or vendor  
 Direct payment to UCSD Travel Card

**Payee** [Search](#) WOHLRAB-HERBST, NANCY L

**Payee ID** 00441305P

**Payee Address Type** QB

**Ledger Reference** GAO0000901

*This will display in the operating ledger as the document reference. You may override the default and add your own reference code.* max 10 characters

Coming soon!



# Policy considerations for Celebrating Events

## Step 4: Payment



### Expense Amounts

**i** If this is one of multiple payments for meals for a single event, ensure that the allowable per-person cost is not exceeded for the total event meals expense.

Breakfast

Lunch

Dinner

Cost per person is \$NaN.00.

Light Refreshments

Light refreshments are not to be entered if part of a meal.  
Please include in meal expense.

Other

Examples include room rental and setup fees, media rental fees, decorations, and other non-meal expenses.  
Do use same account code as meal/light refreshment expense.

Total to be paid

Change to Total calculates automatically

### Receipts / Invoices

**i** Receipts are required because one or more expense amounts are \$75 or greater.

Receipts / Invoices Attachment

No file chosen

You can attach a PDF, Word, Excel, or text file. If you are unable to attach, the alternative is to use a fax option and allow time for UCSD Travel to attach for you.  
[Access fax instructions](#)

Itemized receipts are required for all expenses \$75 or more *and* for all special entertainment (*any amount*)

# Policy on Celebrating Events

## But remember....

Faculty and staff morale-boosting functions, such as appreciation, recognition, length of service, retirement, farewell, picnics or *holiday gatherings*, must serve a UC San Diego business purpose and can be approved as special entertainment if costs are:

- Limited to only the employees in attendance
- Permitted under the fund source

## And the event should be....

- Cost effective
- In accordance with the proper use of public funds
- Directly associated with the conduct of official UC San Diego business
- In service of a clear UC San Diego business purpose with no personal benefit derived by either the official host or attending employees

| Meal Type          | Maximum Per Person |
|--------------------|--------------------|
| Breakfast          | \$26               |
| Lunch              | \$45               |
| Dinner             | \$78               |
| Light refreshments | \$18               |

# General Policy on Per-Person Meal Maximums

## Remember those per-person meal maximums!

- You must provide a written justification if expenses exceed the per-person meal maximum, including reasons why the higher costs were unavoidable and necessary to achieve a business purpose.
- If it exceeds 200% over the limit, the event must be approved by the Chancellor.
- The per-person meal expense is for the entire event:
  - Includes pre-meal items (e.g., beverages and hors d'oeuvres), meal, labor, sales tax, delivery charges, and other service fees)
  - Does not include room rental, setup fees, media rental fees, decorations, and other non-meal expenses (list these under “Other”)

Expense Amounts

**i** If this is one of multiple payments for meals for a single event, ensure that the allowable per-person cost is not exceeded for the total event meals expense.

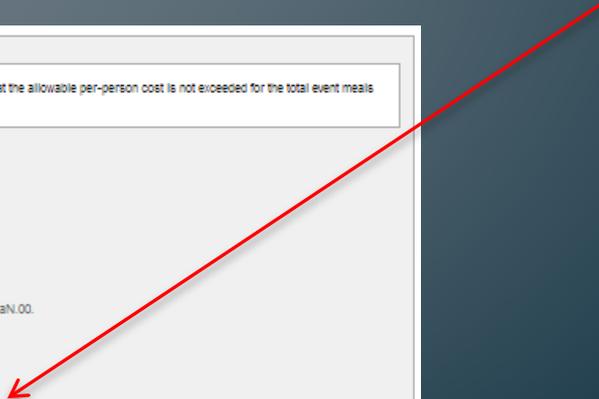
Breakfast

Lunch

Dinner   
Cost per person is \$NaN.00.

Light Refreshments   
Light refreshments are not to be entered if part of a meal.  
Please include in meal expense.

Other   
Examples include room rental and setup fees, media rental fees, decorations, and other non-meal expenses.  
Do use same account code as meal/light refreshment expense.



| Meal Type          | Maximum Per Person |
|--------------------|--------------------|
| Breakfast          | \$26               |
| Lunch              | \$45               |
| Dinner             | \$78               |
| Light refreshments | \$18               |

# Policy considerations for Celebrating Events

## Step 5: Accounting



- Alcohol was served at this event. Please be sure to follow the [fund-source requirements](#).
- This is a "Special Event". Please be sure to follow the [fund-source requirements](#).

### Accounting Distribution

**i** Accounting distribution must total \$6,750.00

| Index | Account  | Amount |
|-------|--|--------|
|       | 637465, Celebrations - Employee and Non-employee Social Events |        |
|       | 637465, Celebrations - Employee and Non-employee Social Events |        |
|       | 637465, Celebrations - Employee and Non-employee Social Events |        |
|       | 637465, Celebrations - Employee and Non-employee Social Events |        |
|       | 637465, Celebrations - Employee and Non-employee Social Events |        |
|       | <b>Total</b>   |        |

Change to Total calculates automatically

### Other Attachment

**i** Optionally attach any other documentation to this event.

**Other Attachment**  No file chosen  
You can attach a PDF, Word, Excel, or text file.

[Previous](#) [Save and Exit](#)

Updating Celebrating Account Codes to include:

- 637465 Celebrations – Employee and Non-employee Social Events
- 652000 Parking only (Travel-in-state)
- 634502 Audio/Visual Services
- 638173 Beverages – Alcoholic.

# Policy considerations for Celebrating Events

## Step 6: Approvals



### Approval Requirements

- i** Based on the information you provided, people with the following roles must approve this request before it can be processed.
- Fund manager approval is required for use of fund 69750A.
  - Department [entertainment approval](#) is required for entertainment.
  - Vice Chancellor / Designee approval is required for [special events](#).

### Department and Fund Manager Approval

- i** Select the appropriate template. Approval routing is based on your "INV/E\*" approval template, which your Department Security Administrator (DSA) sets up following the [guidelines](#). Contact your DSA if you have a template set up question.

**No Approval Templates were found. Please work with your DSA to get an INV/E\* Entertainment Approval set up.**

### Vice Chancellor / Designee Approval

- i** If needed, MyMeetings automatically provides you with option(s) for special entertainment approval. Choose the appropriate primary and alternate approver.

Primary Approver

Alternate Approver



Because Celebrating is a “Special Entertainment” event, Vice Chancellor or Designee approval is required.

# Policy considerations for Celebrating Events

## If you are having the event at a private residence....

- Follow IRS policy when making payment for services to individuals such as servers or cooks.
- Remember that payment for these services is considered income to the recipient and must be reported to the IRS for tax purposes.
- Collect names and Social Security numbers of recipients of payments for personal services. Include your contact information in the request so that Travel staff can obtain the Social Security numbers and enter this data directly into a secured application at the time of processing.
- Contact Diana Olson, General Liability Manager at (858) 534-3820 or by email to learn about potential risk and ways in which to minimize it.



# A reminder re Fund-Source Restrictions

| Fund Source   | Restrictions   |
|---|--|
| 19900A (state appropriates general fund)  | Any portion of meal expenses in excess of the allowed amounts<br>Alcoholic beverage expenses or tobacco purposes |
| 199XA, 18000A-18199A (specific and special state appropriations)                    | An expense for a holiday party, or an event including a spouse/partner/family member.                            |
| Contract and grant funds  | Alcoholic beverage expenses or tobacco purchases   |
| Other funds:<br>Endowments, gifts, and all other funds administered by UC San Diego | Any expenses restricted by the funding agency  |

What comments may we address?

