

ADDENDUM B

Hospitality Expense Matrix

Hospitality Expenses	State Funds	State Trust Funds	Auxiliary Organization Funds
Accreditation Visits	Yes	If authorized in State Trust Application	Yes
Advisory Board Meetings (with External Representation)	Yes	If authorized in State Trust Application	Yes
Alcoholic Beverages	No	If authorized in State Trust Application	Yes
<u>Awards and Prizes</u> provided to employees for exceptional contributions, to students to honor academic excellence or in conjunction with university events, to individuals to participate in research-funded survey or student as well as employee recognition and official presentations for lengths of service awards (with at least 5 years of service)	Yes	If authorized in State Trust Application	Yes
Commencement Receptions	Yes	If authorized in State Trust Application	Yes
Employee Orientation (HR)	Yes	If authorized in State Trust Application	Yes
Entertainment Events (e.g., equipment and venue rentals, décor, music, performers)	No	No	Yes
Gifts for Employee Birthdays, Weddings, Baby Showers, Retirements/Farewells, and Other Personal Acknowledgements	No	No	No
Gifts for Employees Recognized for Significant Leadership/Service on Campus or in the Community	No	No	Yes
Gifts for Expressions of Sympathy to Employee (single gift per recognition; immediate family member – spouse, domestic partner, significant other, parent, child)	No	No	Yes
Gifts to Official Guests	No	If authorized in State Trust Application	Yes
Guest Lecturers	Yes	If authorized in State Trust Application	Yes
Holiday Parties for Donors	No	If authorized in State Trust Application	Yes
Holiday Parties for Employees	No	No	No*
Honored Faculty Reception	Yes	If authorized in State Trust Application	Yes
Honors Convocation	Yes	If authorized in State Trust Application	Yes
Job Fairs	Yes	If authorized in State Trust Application	Yes
Meals and Light Refreshments (other than alcoholic beverages) for Employee Meetings and Events may be permitted if the expenses occur infrequently, are reasonable, and appropriate to the business purpose. See Addendum A for maximum per person rates.	Yes	If authorized in State Trust Application	Yes

Hospitality Expenses	State Funds	State Trust Funds	Auxiliary Organization Funds
Meals and Light Refreshments (other than alcoholic beverages) for Meetings and Events Attended by Official Guests . <i>See Addendum A for maximum per person rates.</i>	Yes	If authorized in State Trust Application	Yes
Membership in Academic/Business Organizations	Yes	If authorized in State Trust Application	Yes
Membership in Social Organizations	No	If authorized in State Trust Application	Yes
Official Morale-Building and Appreciation Activities that Serve a Business Purpose [e.g., <i>Department/Manager/Chair/Faculty Retreat</i>]	Yes	If authorized in State Trust Application	Yes
Official Recognition and Presentations for Lengths of Service Awards or Exceptional Contributions (with at least 5 years of service) [e.g., <i>Staff Service and Recognition of Excellence Event</i>]; Official Morale-Building and Appreciation Activities that Serve a Business Purpose	Yes	If authorized in State Trust Application	Yes
Open House and Outreach Events	Yes	If authorized in State Trust Application	Yes
Peer Education Programs	Yes	If authorized in State Trust Application	Yes
Promotional Items	Yes	If authorized in State Trust Application	Yes
Recruitment - Candidates	Yes	If authorized in State Trust Application	Yes
Retirement/Farewell/Memorial Gatherings (with at least 5 years of service)	No	If authorized in State Trust Application	Yes
Student Awards and Recognition Events	Yes	If authorized in State Trust Application	Yes
Training and Employee Development Programs (HR)	Yes	If authorized in State Trust Application	Yes
Tobacco Products	No	No	No**
Travel for Official Guests (must comply with CSU Travel Guidelines)	Yes	If authorized in State Trust Application	Yes
Volunteer/Donor Appreciation Not Related to Fundraising	Yes	If authorized in State Trust Application	Yes
Volunteer/Donor Appreciation Related to Fundraising	No	If authorized in State Trust Application	Yes
Workshop Host to other Campuses	Yes	If authorized in State Trust Application	Yes
Workshops/Conferences Related to University Operations	Yes	If authorized in State Trust Application	Yes

State Funds – monies that are either appropriated by the legislature, as part of the budget process or continuously appropriated (e.g., tuition and fees).

State Trust Funds – non-appropriated funds which receive monies from sources other than the State Controller’s Office. State Trust Funds may be utilized for hospitality expenditures if authorized by the signed trust agreements in place.

Auxiliary Organization Funds – CSU auxiliary organizations are separate legal entities authorized in the Education Code to provide essential services to students and employees. Auxiliary organizations operate in association with campuses pursuant to special written agreements, and are authorized to perform specific functions that contribute to the educational mission of the campus. These organizations are subject to applicable state and federal laws and regulations. Hospitality expenses may be charged to auxiliaries provided the expense serves a bona fide business purpose. Auxiliary organization funds may be used to pay for alcoholic beverages, formal awards and service recognition, entertainment services, gifts, membership in social organizations and promotional items to the extent these purchases are not restricted by other applicable laws, regulations, or funding source agreements.

* Restricted unless noted in the agreement or budget.

** Federal Funds may not be used to purchase alcoholic beverages or tobacco products, unless alcohol and tobacco are part of the research. CSUN’s sponsored programs are generally administered in The University Corporation.

Please refer to the CSUN Hospitality Policy for additional information. This matrix is an extension of the Hospitality Policy.