

Exceptional Expenditure Grid

	<u>Allowed</u>	<u>Additional Approval Required*</u>	<u>Notes</u>
Meals & Entertainment			
Breakfast	\$27 max**	Over max	Must include detailed justification for exceeding maximum allowed amounts
Lunch	\$47 max**		
Dinner	\$81 max**		
Light refreshments	\$19 max**		
Employee Morale-Building Activities			
Retirement or separation of an employee of at least 5 years	Yes	Yes	
Employee recognition reception	Yes	Yes	
New employee reception	Yes	Yes	
Annual faculty/staff picnics	Yes	Yes	
Holiday gatherings	Yes	Yes	
Birthdays	No		
Weddings	No		
Anniversaries	No		
Spouses			
Must serve as a bona fide University business purpose	Yes	Yes	Must provide explanation of spouse's role or contribution to the event
Spouse of a prospective academic or staff appointee is present at a meal taken in connection with the prospective appointee's recruitment by UCSF	Yes	Yes	Must include the corresponding recruitment search number
Spouse of UCSF employee or potential donor is present at a fundraising event which a meal is served	Yes	Yes	

Travel			
MUST USE MOST ECONOMICAL METHOD OF TRANSPORTATION			
Airfare			
Business or first-class	Yes	Yes	<p>Business class seating can only be purchased:</p> <ul style="list-style-type: none"> • to reasonably accommodate a disability. • When the traveler is 6'3" or above. • Non-coach seating is the only service offered between two points. • The use of coach class would be more expensive or time consuming. <p>First Class may only be purchased when it is the only additional class offered above economy.</p> <p>Documentation for purchasing Business and First Class seating must be included with the travel expense claim and sent to the Dean's Office for final approval.</p>
Spouses			
If spouse of University employee or University guest if presence is served as a bona fide University business purpose	Yes	Yes	Must provide explanation of spouse's role or contribution to the event
Ground transportation			
Chauffeured car/limosines	No	No	

Awards & Gifts			
To employees			
Non-cash awards for recognition of retirement, length of service, work related achievements, and sympathy	Yes	Yes	Per Policy G-41: Employee Non-Cash Awards and Other Gifts
Birthdays, weddings, anniversaries, and holiday gifts	No		
Farewell parties for employees with less than 5 years of service	No		

*The Dean's Office must approve additional exceptional expenditures. In the rare case that the amounts exceed the maximum allowed amounts, pre-approval is required. Pre-approval requests should be emailed to the Financial Operations Analyst along with justification.

**Per person rate. Meal rates include labor, sales tax, delivery charges, and other service fees. Individual events may have pre-approved budgets which may be less than the maximum allowed per person limits. For more information, please contact Patricia Bustos at Patricia.Bustos@ucsf.edu.

References:

Exceptional Expenditures Policies and Guideline
<https://financemedschool.ucsf.edu/exceptional-expenses>

BUS-79 Policy: Expenditures for Business Meetings, Entertainment, and Other Occasions
<https://policy.ucop.edu/doc/3420364/BFB-BUS-79>

G-28 Policy: Travel Regulations
<https://policy.ucop.edu/doc/3420365/BFB-G-28>