

UF BUSINESS ENTERTAINMENT POLICY CHEATSHEET

MEALS

Business Meals

Business Breakfast - \$25/person
Business Lunch - \$40.00/person
Business Dinner - \$70.00/person

*Gratuity should not exceed 15% of subtotal before taxes and is excluded in the per person rate above. (Gratuity may be higher in venues that automatically charge a gratuity.)

Business meal expenses exceeding the limits require approval by the dean or vice president. Official delegates may NOT approve these exceptions. Exceptions for department chairs, deans & vice presidents require additional higher-level approval.

Spouses - Partners - Families

Generally NOT allowed.

May be allowed IF he/she has a SIGNIFICANT role in the success of the event and constitutes a bona-fide business purpose. Their presence must be essential, not just beneficial, to the employee's ability to carry out a business purpose.

Examples:

- Spouse or partner of dean when meeting alumni or engaging in fund raising
- Spouse, partner or family member of an employee hosting a visiting lecturer who travels to UF to make a presentation at which the visiting lecturer's spouse/partner is present.
- Meal associated with recruitment of a prospective faculty or staff member whose spouse/partner is in attendance.
- A UF function held at the employee's home when the spouse or partner participates as a host (not just present at home)

*Include documentation (event or meeting agenda, letter of invite requesting presence of spouse or domestic partner, etc) to show the attendance of the spouse/partner or family member complies with the requirements of expenditure (see yellow box).

Business Meal Qualifiers

- 1- Should include at least on non-UF person whose presence is necessary
- 2- If meeting of two or more UF employees: must meet all 3 criteria:

- Meet no more than weekly
- Agenda driven & directly concerns UF business
- Meeting is during a regular meal time and could to be otherwise scheduled during regular working hours

- Expenses can only be incurred for those whose presence is NECESSARY to the business discussion
- UF will not pay or reimburse meal expenses that lack documentation or a CLEAR business purpose
- Meetings and or gatherings that primarily social DO NOT qualify for payment or reimbursement as a business meal, no matter the attendees.

Meals with a Donor or Prospect

-If the donor/prospect whose restaurant selection or menu selection results in a bill being more than the allowable limit:

- Submit and indicate donor/prospect chose venue and/or menu items.
- Indicate on receipt which items were directly ordered and consumed by donor/prospect
- *UF employees should try to adhere to allowable limits as practical for your meal selections when this occurs.

-If donor/prospect invites guests:
Submit reimbursement & indicate on receipt the number of attendees invited by said donor/prospect. (Generally donors/prospects should only invite individuals that directly influence the decision to make a gift.)

FUNCTIONS

University Functions

\$100/person for ALL expenses

Breakdown

Food & Drinks - \$60.00/person

Venue Rental, service charges & other associated costs \$40.00/person

Payments/reimbursements must include description of gathering's business purpose and list of attendees.

University Function expenses exceeding the limits require approval by the dean or vice president. Official delegates may NOT approve these exceptions. Exceptions for department chairs, deans & vice presidents require additional higher-level approval.

Large gatherings, such as those associated with graduation or University-wide events are not subject to the limits above but expenses must be reasonable, prudent, appropriate to the occasion, and consistent with UF's mission. There must be a description of gathering's business purpose and estimated number of attendees.

University Functions

To provide food at seminars, retreats, workshops, orientations or other UF event. Must be no more than monthly and open to ALL employees in a unit/department.

Examples

- 1- Event associated with department conferences or workshops
- 2- Holiday or beginning of AY or FY events (which may include spouses/partners or family members
- 3- Staff development. For reasons of employee training and/or team building-it can be beneficial to provide food and beverages for staff at retreats.
- 4- Staff recognition events hosted by the department, college or division.

ENTERTAINMENT

Entertainment

\$75/person for ALL expenses

Applies to all venues including restaurant expenses and entertainment in private residences.

Should be appropriate to the type of meal or event.

*Gratuity should not exceed 15% of subtotal before taxes and is excluded in the per person rate above. (Gratuity may be higher in venues that automatically charge a gratuity.)

Payments/reimbursements must include description of gathering's business purpose and list of attendees.

Entertainment expenses exceeding the limits require approval by the dean or vice president. Official delegates may NOT approve these exceptions. Exceptions for department chairs, deans & vice presidents require additional higher-level approval.

Entertainment

UF may pay or reimburse expenditures relating to entertainment when the purpose is:

- 1- FUNDRAISING
- 2- Promotion of the University
- 3- Entertainment of guests of UF by designated UF officials (deans, vice presidents, development officers, senior administrators and other employees who have been specifically asked to serve in a host capacity.
- 4- Cultivating a donor/prospect or engaging alumni.

ALCOHOL

LIMIT 30% alcohol and 70 % food

(Unless meeting a donor, prospect or other guests for 'drinks only' meeting- stay within \$75/person entertainment limit)

-Corking fees, etc are only allowed if total cost of alcohol & fees are within the limits of the policy

-If multiple payment documents are submitted for the same event and alcohol is paid separately, a copy of all documentation related to the event must be included to verify the above 30/70 alcohol/food limit ratio.

UF leadership reserves the right to deny payment or reimbursement of excessive expenditures.

Serving alcohol at non-licenses venues including private residences

Generally funds not allowed to be used for alcoholic beverages unless alcohol purchased from and served by a licensed caterer or restaurant.

Exception may be made for off-campus event at department/unit or college representatives' homes at which only BEER AND WINE are served. All other alcohol rules must be followed, including reasonable expenditure guidelines

- All pertinent laws, rules and UF policies regarding alcoholic beverages must be observed.
- The area where the alcohol is being served should be monitored to ensure that only invited guests participate in the event.

MORE THAN 2 of these in a year are considered an exception