Authority to Approve
Business Meeting, Entertainment, and Other Occasion Expenses
(Delegation of Authority SCDA-BUS79.01)

I. Delegation Summary

Delegated To: Senior Administrative Officers, which include the Campus Provost/Executive Vice Chancellor, Vice Chancellors, Vice Provosts, Deans, Associate Chancellor(s), Assistant Chancellor(s), Assistant Campus Provost, University Librarian, Director – UCO Lick Observatory; and to an Assistant or Associate Vice Chancellor on a conditional basis (see section II.C.1.a).

Scope of Delegation: This delegation designates campus authority to approve top-level and standard meal and light refreshment expenses provided at student or entertainment events, and business meetings, and other expenses associated with entertainment events.

Delegated By:

[Signature]
Chancellor George R. Blumenthal 4/17/09 Date

Effective Date: May 1, 2009

II. Detailed Delegation

A. Detailed Delegation Statement

Effective May 1, 2009, the Senior Administrative Officers listed above are responsible for administering the provisions of UC Business and Finance Bulletin BUS-79 Expenditures for Business Meetings, Entertainment, and Other Occasions, and related UCSC-specific policies.

B. Restrictions/Exceptions

Exercise of this authority is subject to all the restrictions, limitations, conditions, and instructions outlined in UC Business and Finance Bulletin BUS-79 Expenditures for Business Meetings, Entertainment, and Other Occasions and in any related UCSC
policies addressing the procurement or payment of meals, light refreshments, and other expenses associated with business meetings, entertainment events, and other occasions.

C. Authority to redelegate

1. The authority to approve standard, but not “top-level” meal and light refreshment expenses associated with student and entertainment events and business meetings up to a specified per-event limit may be redelegated by an authorized Senior Administrative Officer to a qualified individual in one of the following positions:

- Associate or Assistant Dean
- Department Chair
- Associate or Assistant Vice Chancellor
- Associate or Assistant Provost
- Associate or Assistant University Librarian
- College Provost
- Director
- College Administrative Officer
- Associate College Administrative Officer
- Divisional Business Manager reporting directly to a Senior Administrative Officer

   a. The authority to approve “top level” meal and light refreshment expenses associated with student and entertainment events and business meetings is also delegated to an Associate or Assistant Vice Chancellor; however, the authority is effective only upon official written approval by the relevant Vice Chancellor. This authority may not be redelegated.

   b. The authority to approve relevant standard, but not “top level” expenses may not be redelegated except by an authorized College Administrative Officer or Associate College Administrative Officer to a qualified Coordinator of Residential Education for the procurement and purchase of meal and light refreshments for a student event.

2. Any redelegation must be in writing with copies to UCSC Financial Accounting and Reporting Unit.

D. Definitions

Business meeting: a meeting of employees conducting official University business that includes the purchase of meals and/or light refreshments.

Entertainment event: a UCSC-sponsored social or recreational event that includes the purchase of meals, light refreshments, and/or related goods or services.

Senior Administrative Officer: A holder of one of the following positions: Campus Provost/Executive Vice Chancellor, Vice Chancellor, Vice Provost, Dean, Associate Chancellor, Assistant Chancellor, Assistant Campus Provost, University Librarian, Director – UCO Lick Observatory.

Standard expense: An expense not requiring top-level expense approval.

Student event: a student event supporting the University’s educational program that includes the purchase of meals and/or light refreshments.

Top-level expense: an expense that requires "additional" approval or is an exception to the bulletin as defined in UC Business and Finance Bulletin BUS-79 Expenditures for
Business Meetings, Entertainment, and Other Occasions. It includes an expense meeting one of the following criteria:

- Exceeds the per-person spending limit
- Associated with one of the following types of events:
  - Employee morale-building event
  - Event in which the spouse, domestic partner, or a family member of the official host or guest attends
  - Event in which tickets to a sporting, theatrical, or cultural event are provided
  - Event in which a cash contribution is included in the cost of a meal or registration fee paid to a non-profit organization

III. "Supersedes" Notification

This delegation of authority supersedes Delegation of Authority to Approve Expenditure of University Funds for Entertainment, Chancellor Pister to Senior Administrative Officers, dated June 1, 1993; and, Delegation of Authority for Approval of Entertainment Expenses, Chancellor Greenwood to Senior Administrative Officers, dated May 3, 2002, addressing this subject.

IV. Getting Help

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<td>Implementing or interpreting this delegation of authority</td>
<td>Financial Affairs Guide to Delegating Authority to Approve Entertainment Expenses</td>
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<td>Contact information may be obtained from the Financial Affairs website (<a href="http://financial.ucsc.edu">http://financial.ucsc.edu</a>)</td>
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V. Authority/References

References


VI. Copies

The following individuals/offices were provided copies of this delegation:

**UCOP**
Executive Vice President, Business Operations
Universitywide Policy Office

**UCSC**
Vice Chancellor, Business and Administrative Services
Campus Controller
Director, Internal Audit
Policy Coordination

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UC Santa Cruz Delegation of Authority  
peo@ucsc.edu; (831) 459-4003