

# **POLICY GUIDELINES FOR PLANNING EMPLOYEE MORALE-BUILDING EVENTS & ACTIVITIES**



*Including Staff Appreciation; Recognition, Retirements, Holiday Parties and Employee Gifts*

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- Section I:**        **Guidelines for Employee Morale-Building Events & Activities**  
*Including Staff Appreciation, Recognition & Holiday Parties*
- Section II:**      **Guidelines for Retirements**
- Section III:**     **Guidelines for Employee Gifts**

## SECTION I: GUIDELINES FOR EMPLOYEE MORALE-BUILDING EVENTS & ACTIVITIES

*Including Staff Appreciation; Recognition & Holiday Parties*



<p style="text-align: center;"><b>ALLOWABLE EXPENSES</b></p>  <p style="text-align: center;"><b>SUBJECT TO EXCEPTIONAL VP APPROVAL</b></p>	<ol style="list-style-type: none"> <li>1. Meals or light refreshments associated with official employee morale-building and appreciation activities that serve a business purpose are subject to exceptional VP approval. Examples of such occasions include:             <ol style="list-style-type: none"> <li>a. Holiday gatherings</li> <li>b. A gathering to honor a departing employee who is retiring or who is separating from employment with at least 25 years of service</li> <li>c. Employee recognition receptions</li> <li>d. Annual faculty/staff picnics</li> <li>e. New employee receptions</li> </ol> </li> <li>2. <b>For 2022 year-end events/activities</b>, the maximum per-person expenditures for meals and light refreshments furnished by UCSF Benioff Children Hospital Oakland may not exceed <b>\$30 per employee</b>.             <ol style="list-style-type: none"> <li>a. The maximum per-person expenditures listed above includes amount for food, beverages, service rental fee etc. AND gifts.</li> <li>b. This is separate from the recognition budget and should not be combined.</li> </ol> </li> <li>3. The maximum per-person expenditures for meals and light refreshments furnished by UCSF Benioff Children Hospital Oakland may not exceed the following amounts:             <ul style="list-style-type: none"> <li>• Breakfast \$31.00</li> <li>• Lunch \$54.00</li> <li>• Dinner \$94.00</li> <li>• Light refreshments \$22.00</li> </ul> <ol style="list-style-type: none"> <li>a. <b>The maximum per-person expenditures listed above include the cost of the food and beverages, labor, sales tax, delivery charges, tips and other service fees.</b> If a reception before a meal includes beverages** and hors d'oeuvres, the combined charges for the reception and the meal should be treated as a single event for purposes of calculating per-person costs.</li> <li>b. The costs of room rental, room setup fees, media rental, and decorations, etc., are not included in the per-person costs unless those costs cannot be separated by the vendor.</li> </ol> </li> <li>4. Frequency of Meals/Light Refreshments*:             <ol style="list-style-type: none"> <li>a. Meals should be limited to no more than once a month or twelve times per year, per group.</li> <li>b. Light refreshments should be limited to no more than twice per month, per group.</li> <li>c. Meals or light refreshments provided to a group should be counted on an event basis, e.g., a two-day meeting should be counted as one event in determining compliance with these guidelines.</li> </ol> </li> </ol>
 <p style="text-align: center;"><b>UNALLOWABLE EXPENSES</b></p>	<ol style="list-style-type: none"> <li>1. <b>Under no circumstances may funds be used for occasions such as employee birthdays, weddings, anniversaries, and farewell gatherings for employees with less than 25 years or service or other occasions of a personal nature.</b></li> <li>2. Room rental, room setup fees, media rental and decorations will not be approved when considered lavish or extravagant.</li> </ol>

*\*Meals or light refreshments provided as part of a staff/business meeting are not subject to pre-authorization or exceptional approval. By policy, the meals/light refreshments must be a necessary and integral part of the business meeting, not a matter of personal convenience. Examples of where it is appropriate to provide catering include when the participants work through the lunch period; circumstances where it would be too time-consuming or disruptive to event continuity for participants to take a meal break away from the meeting location; where there is a scheduled luncheon speaker. Meals and light refreshments as part of a staff/business meeting are subject to the same rules of frequency indicated in #3.*



*\*\*Alcoholic beverages are disallowed under most circumstances. In order to provide alcoholic beverages at an official Hospital entertainment activity or other event, a written authorization shall be obtained in advance from the Hospital President.*

*Federal or local government contract and grant funds may be used for entertainment expenses only as specifically authorized in the contract or grant budget or by agency policy, and only to the extent and for the purpose so authorized. When there is a conflict between agency and Hospital policy, the more restrictive of the two shall apply. No alcoholic beverage or tobacco product purchases may be charged to federal funds.*

## SECTION II: GUIDELINES FOR RETIREMENTS

<p><b>ALLOWABLE EXPENSES</b></p>  <p><b>SUBJECT TO EXCEPTIONAL VP APPROVAL</b></p>	<ol style="list-style-type: none"> <li>1. Retirement event funds apply only to current career BCH Oakland employees who have worked with UCSF Benioff Children Hospital Oakland for at least 25 years. The employee must have notified Human Resources so the retiree may be coded accordingly in the system.</li> <li>2. The celebration must be coordinated by a staff member from the retiree's department. Invited guests must be mostly comprised of BCH Oakland staff. The retiree's immediate family members may be invited. The retiree must also be present.</li> <li>3. The dollar value for each guest should follow the maximum per person meal allowance indicated in Section I, bullet 2 (page 1),</li> <li>4. The total funding should not exceed \$1,000.00 per retiree.</li> <li>5. Catering Best Practices: <b><i>In light of Covid-19, departments are asked to practice social distancing and follow masking protocols.</i></b> If an employee incurs catering costs out-of-pocket such as for decorations, please follow the guidelines outlined in #6 for reimbursement.</li> <li>6. When expenses are paid out-of-pocket by the coordinator, a request for reimbursement, recharge, or payment of expenses for meals or light refreshments and related services must be submitted on the appropriate Check Requisition form available in Docusign.</li> </ol>
 <p><b>UNALLOWABLE</b></p>	<ol style="list-style-type: none"> <li>1. A retirement gift is provided by UCSF Benioff Children Hospital Oakland via a BCH Oakland Approved Program Supplier for all employees retiring with at least twenty-five years of service, BCH Oakland will not reimburse for additional retirement gifts.</li> <li>2. Room rental and alcoholic beverages are not covered by the funds. Personalized items, souvenirs, and other gift items are not covered by this fund. It cannot be claimed as decoration. If it's a non-catered event, household items are not reimbursable.</li> </ol>

## SECTION III: GUIDELINES FOR EMPLOYEE GIFTS

<p style="text-align: center;"><b>ALLOWABLE GIFTS</b></p>  <p style="text-align: center;"><b>NOT SUBJECT TO EXCEPTIONAL VP APPROVAL</b></p> <p style="text-align: center;"><i>(UNLESS PER PERSON AMOUNT IS EXCEEDED OR DIVISION RULES REQUIRE VP APPROVAL)</i></p>	<ol style="list-style-type: none"> <li>1. Employee recognition awards are meant to be <b>occasional</b> and therefore must be presented to an employee on an infrequent basis. <b>An employee should not receive more than three such awards in a calendar year.</b> If an employee receives more than this amount, the entire amount may be taxable to the employee. It is the department's responsibility to report this as taxable income.</li> <li>2. Employee recognition awards should be provided within an established recognition program and based on objective criteria. Such awards must also be presented to employees on a basis that does not discriminate in favor of highly compensated employees.</li> <li>3. <b>GIFT CERTIFICATES &amp; CARDS:</b> <ol style="list-style-type: none"> <li>a. A gift certificate or card may be awarded to an employee if it is:           <ol style="list-style-type: none"> <li>i. Inscribed with the recipient's name,</li> <li>ii. Not transferable, and</li> <li>iii. Cannot be redeemed for cash or used to reduce the balance due on the recipient's account with the merchant</li> <li>iv. Cannot be used for services</li> <li>v. Nonnegotiable (ie. retail card)</li> </ol> </li> </ol> </li> <li>4. <b>RECOGNITION: \$75*</b> <ol style="list-style-type: none"> <li>a. An item of tangible personal property may be awarded to an employee in recognition of their noteworthy work-related accomplishments. Such awards should be of minimal value (eg. flowers, fruit, a book, a plaque, or similar item).</li> </ol> </li> <li>5. <b>PRIZES AND OTHER GIFTS: \$75*</b> <ol style="list-style-type: none"> <li>a. Departments holding occasional raffles for door prizes and other gifts should limit the value of such prizes and gifts to the \$75 per-person limit, and no more than three times for each employee per year for three separate achievements.</li> </ol> </li> <li>6. <b>BIRTHS: \$75*</b> <ol style="list-style-type: none"> <li>a. Gifts of tangible personal property, including flowers, may be given to recognize a birth.</li> </ol> </li> <li>7. <b>SYMPATHY GIFTS: \$75*</b> <ol style="list-style-type: none"> <li>a. Gifts of tangible personal property, including flowers, may be presented as an expression of sympathy in the event of the death or major illness of an employee or a member of the employee's family or household. As an alternative, a cash contribution may be made to a charitable organization in lieu of a gift of tangible personal property.</li> </ol> </li> </ol> <p><i>*Amount does not include engraving, packaging, insurance, sales tax, mailing and the cost of gift wrapping that does not add substantial value to the gift.</i></p>
 <p style="text-align: center;"><b>UNALLOWABLE GIFTS</b></p>	<ol style="list-style-type: none"> <li>1. <b>PERSONAL GIFTS – Birthday, Holiday, Anniversary, Farewell, Wedding, Graduation</b></li> <li>2. <b>LENGTH OF SERVICE:</b> <ol style="list-style-type: none"> <li>a. UCSF Benioff Children's Hospital Oakland provides length of service gifts to employees via a BCH Oakland Approved Program Supplier to recognize 5, 10, 15, 20, 25, 30, 35, 40, 45, and 50 year service milestones. BCH Oakland will not reimburse for additional length of service gifts.</li> </ol> </li> <li>3. <b>RETIREMENT:</b> <p>BCH Oakland provides a gift to all retirees with at least 25 years of service via a BCH Oakland Approved Program Supplier. BCH Oakland will not reimburse for additional retirement gifts.</p> </li> </ol>

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|  | <ol style="list-style-type: none"><li>4. <b>GIFTS OF CASH</b> – Except donations to a charity as an expression of sympathy</li><li>5. <b>RECREATION MEMBERSHIPS</b></li><li>6. <b>SEASON TICKETS TO SPORTING OR CULTURAL EVENTS.</b></li></ol> |
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