Important Considerations to Keep in Mind for Morale Events in the School of Medicine

- These guidelines are used by the School of Medicine Dean’s Office. Other UCSF control points may have established different, even more restrictive guidelines. SOM departments may establish more restrictive guidelines if they choose.

- These guidelines are based on UC policy, campus guidance, and IRS regulations. They also reflect the additional COVID pandemic restrictions established by UCSF.
  - Expenditures should serve a business purpose, be cost effective, and reflect the best use of public funds.
  - The University will not reimburse costs to a University employee or student when the reimbursement results in taxable income to the individual.

- These guidelines are effective as of the date above and may be subject to change without notice as rules and requirements require.

- UC rules and these guidelines apply to all SOM funds, including discretionary, philanthropy, and sponsored funds used to support morale events. There may be additional spending restrictions imposed by contracts, grants and other restricted funds, as well as department and division practices.

- The following table outlines the limits established in UC policy. Our ask is that you make spending decisions that are mindful and respectful of the current financial and economic environments in which other UCSF units, UC campuses, and Californians as a whole are navigating.

- We fully recognize the need to address morale issues, team-build, and sustain connections under current pandemic working requirements, but we also ask that you look for ways to schedule morale events that are no- or low-cost and/or that limit the frequency of the events.

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<th>Question</th>
<th>SOM Dean’s Office—Guidance for Morale Events Under Pandemic Restrictions and Conditions</th>
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| Can I get reimbursed for the purchase of food for first year or other students? | - **Student** (unpaid trainees, including PhD students who receive stipends or have a student academic appointment) **morale** events are allowable for reimbursement.  
  - Due to COVID restrictions, they cannot be in-person. If food is provided on site, it has to be separately boxed or wrapped and cannot be eaten communally.  
  - Meal cards only if necessary to the event (e.g., GrubHub, Doordash, local restaurants, etc.); not Amazon.  
  - BUS-79 sets per person limits as outlined below and include food, beverage, tax, delivery charges, gratuity.  
    - Breakfast $27  
    - Lunch $47  
    - Dinner $75 (less than the $81 in BUS-79 because of the gift card limit of $75)  
    - Light Refreshment $19  
  - General limit of no more than 12x per year does NOT apply to non-employee students as BUS-79 states, “Meals or light refreshments may be provided to non-employee students on a more frequent basis” than the limits for employees. However, the number of events should be reasonable given economic conditions.  
  - Must be approved after-the-fact by SOM Dean’s Office, i.e., at the time of reimbursement, adding the Dean’s Office as an approver. SOM departments may have pre-approval requirements; you should confirm with your CAOs or finance managers. Pre-approval from the Dean’s Office is not required, but you are strongly encouraged to discuss the details with 
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| **Can I do this for people in my lab?** | - **Employee morale** events are allowable.  
- Due to COVID restrictions, they cannot be in-person. If food is provided on site, it has to be separately boxed or wrapped and cannot be eaten communally.  
- Meal cards only if necessary to the event (e.g., GrubHub, Doordash, local restaurants, etc.); not Amazon.  
- BUS-79 sets per person limits as outlined below and include food, beverage, tax, delivery charges, gratuity.  
  - Breakfast $27  
  - Lunch $47  
  - Dinner $75 (less than the $81 in BUS-79 because of the gift card limit of $75)  
  - Light Refreshment $19  
- BUS-79 limits these events to monthly meals, per group or twice-monthly light refreshments, per group. Given current financial circumstances, frequency of events should be reasonable.  
- Must be approved after-the-fact by SOM Dean’s Office, i.e., at the time of reimbursement, adding the Dean’s Office as an approver. SOM departments may have pre-approval requirements; you should confirm with your CAOs or finance managers. Pre-approval from the Dean’s Office is not required, but you are strongly encouraged to discuss the details with the Dean’s Office Financial Affairs Unit in advance to avoid disallowed/non-reimbursable costs. |
| **Can I get reimbursed for a happy hour (alcohol included) for first year or other students.** | - “Happy hour” suggests alcohol is the primary purpose; any request for reimbursement that includes that description is automatically disallowed. However virtual, social/collaboration hours with food and drink are allowed. Follow the guidelines here.  
- Must be within BUS-79 per person limit for light refreshment of $19 per person. This includes food, beverage, tax, delivery charges, gratuity.  
- General limit of no more than 24x per year does NOT apply to non-employee students as BUS-79 states, “Meals or light refreshments may be provided to non-employee students on a more frequent basis” than the limits for employees. However, the number of events should be reasonable given economic conditions.  
- Must be approved after-the-fact by SOM Dean’s Office, i.e., at the time of reimbursement, adding the Dean’s Office as an approver. SOM departments may have pre-approval requirements; you should confirm with your CAOs or finance managers. Pre-approval from the Dean’s Office is not required, but you are strongly encouraged to discuss the details with the Dean’s Office Financial Affairs Unit in advance to avoid disallowed/non-reimbursable costs. |
| **Can I do this for employees in my lab?** | - “Happy hour” suggests alcohol is the primary purpose; any request for reimbursement that includes that description is automatically disallowed. However virtual, social/collaboration hours with food and drink are allowed. Follow the guidelines here.  
- Must be within BUS-79 per person limit for light refreshment of $19 per person. This includes food, beverage, tax, delivery charges, gratuity.  
- BUS-79 limits these events to twice-monthly, per group. Given current financial circumstances, frequency of events should be reasonable.  
- Must be approved after-the-fact by SOM Dean’s Office, i.e., at the time of reimbursement, adding the Dean’s Office as an approver. SOM departments may have pre-approval requirements; you should confirm with your CAOs or finance managers. Pre-approval from the Dean’s Office is not required, but you are strongly encouraged to discuss the details with the Dean’s Office Financial Affairs Unit in advance to avoid disallowed/non-reimbursable costs. |
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<td>the Dean’s Office is not required, but you are strongly encouraged to discuss the details with the Dean’s Office Financial Affairs Unit in advance to avoid disallowed/non-reimbursable costs.</td>
<td>• <strong>COVID restrictions</strong> apply, i.e., no in-person events with food.</td>
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| Are there other rules for social events that people have confronted in the program that prevent them from getting reimbursed for lab or program related activities? | • Food and beverage may be provided but within BUS-79 limits, including food, beverage, tax, delivery charges, gratuity.  
  - Breakfast $27  
  - Lunch $47  
  - Dinner $75 (less than the $81 in BUS-79 because of the gift card limit of $75)  
  - Light Refreshment $19  
  • Morale events for **employees** are limited to 12x per year for meals, 24x per year for light refreshments. These frequency rules do not apply to non-employee students, but should be reasonable given economic circumstances.  
  • Morale events **may be** for employees who leave after five years of service, employee recognition events, annual events, holiday events, general morale/team-building.  
  • Morale events **cannot** be for birthdays, weddings, anniversaries, or other events of a personal nature. Cakes, decorations, or gifts that include “birthday”, “anniversary”, “it’s a boy/girl!”, etc. automatically make the event unallowable and non-reimbursable.  
  • No UC limits have been established for morale entertainment costs. We generally see and, if appropriate and reasonable, approve requests that are in the $20-$50 per person range. There is the expectation that events will be infrequent and will be reasonable given economic circumstances.  
  • Must be approved after-the-fact by SOM Dean’s Office, i.e., at the time of reimbursement, adding the Dean’s Office as an approver. SOM departments may have pre-approval requirements; you should confirm with your CAOs or finance managers. Pre-approval from the Dean’s Office is not required, but you are strongly encouraged to discuss the details with the Dean’s Office Financial Affairs Unit in advance to avoid disallowed/non-reimbursable costs. |