

## Protocol for Retirement & Farewell Gatherings

Ent.Ref. 1.5



### General Remarks:



- A participant list is required for all farewell gatherings and retirement events.
  - Include affiliation and title (Please note if there are any family members or non-staff attending).
  
- Only Auxiliary funds are allowed to be spent on alcohol.
  - If alcohol is served at UCSC hosted events on UCSC premises (including donated), the host needs to adhere to the following UC guidelines:



- Pre-event certification by Top-level EEC, adhering to the Campus Alcoholic Beverage Policy
- Campus police must be notified when there are 50 or more invited participants
- Submit completed Event notification form to Campus police two weeks prior to event:
   
[https://financial.ucsc.edu/Pages/Entertainment\\_EventExpenseGuide.aspx#allowable\\_restricted](https://financial.ucsc.edu/Pages/Entertainment_EventExpenseGuide.aspx#allowable_restricted)



### Per University of California (UCOP) Policy,

University funds <b>MAY NOT</b> be used for expenses for any of the events listed below:	University funds <b>MAY</b> be used for expenses for any of the events listed below:	
<ul style="list-style-type: none"> <li>❖ A retirement or farewell gathering honoring an employee:                             <ul style="list-style-type: none"> <li>● Departing to take a position as an employee at UCSC or any other UC location</li> <li>● With <u>LESS THAN</u> five (5) years of service</li> </ul> </li>   <li>❖ Gatherings to celebrate the birthday, wedding, or anniversary of an employee</li> </ul>	<ul style="list-style-type: none"> <li>❖ A retirement honoring an employee with AT LEAST five (5) years of service</li> <li>❖ UC Retirement Plan Members must be at least the age provided by the Tiers by Financial Affairs.</li> <li>❖ Official paperwork must be filed with Staff Human Resources</li> </ul> <p><b>If your event meets all of the criteria,</b></p> <p>Proceed to  below</p>	<ul style="list-style-type: none"> <li>❖ A farewell gathering honoring an employee with AT LEAST five (5) years of service</li> </ul> <p>Proceed to  below</p>



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### **Retirement events for employees (Account Code: 001250)**

Per University of California (UCOP) policy, University funds may be used to pay for:

- Event
  - DSAS Limits: spend no more than maximum per [Financial Affairs for each meal type per person and NTE](#).
    - *Snacks, Refreshments, Breakfast, Lunch, and/or Dinner*
    - *Including tax, delivery and gratuity*
    - *Per person cost does not include facility fees, supplies, and decorations*

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- Retirement Gift with a [maximum value](#) defined by [Financial Affairs \(including activation fee\)](#)
  - The purchase of the gift must be approved separately by the Department Head, i.e., AVC, Executive Director CSL, Executive Director Housing Services, or equivalent.
  - Award must be presented according to [Campus policy requirements](#).
  - Not included in the Entertainment approval process.

### **Farewell gatherings for employees (Account Code: 001250)**

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- DSAS Limits: spend no more than maximum per [Financial Affairs for each meal type per person and NTE](#).
  - *Including tax, delivery and gratuity.*
  - *Per person cost does not include facility fees, supplies, and decorations.*
    - Only auxiliary funds are allowed to be spent on a farewell gift.

**All farewell gatherings and retirement events require top-level approval**