### **Division of Student Affairs and Success**

# **Protocol for Retirement & Farewell Gatherings**

Ent.Ref. 1.5



#### **General Remarks:**

- A participant list is required for all farewell gatherings and retirement events.
  - o 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



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

University funds <u>MAY NOT</u> be used for expenses for any of the events listed below:

University funds <u>MAY</u> be used for expenses for any of the events listed below:

- A retirement or farewell gathering honoring an employee:
  - Departing to take a position as an employee at UCSC or any other UC location
  - With <u>LESS THAN</u> five (5) years of service
- Gatherings to celebrate the birthday, wedding, or anniversary of an employee



- A retirement honoring an employee with AT LEAST five (5) years of service
- UC Retirement Plan Members must be at least the age provided by the Tiers by Financial Affairs.
- Official paperwork must be filed with Staff Human Resources

If your event meets all of the criteria,

Proceed to



below

 A farewell gathering honoring an employee with AT LEAST five (5) years of service

Proceed to



below

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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:

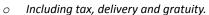
- Event
  - o DSAS Limits: spend no more than maximum per Financial Affairs for each meal type per person and NTE.
    - Snacks, Refreshments, Breakfast, Lunch, and/or Dinner
    - Including tax, delivery and gratuity
    - Per person cost does not include facility fees, supplies, and decorations



- Retirement Gift with a <u>maximum value</u> defined by <u>Financial Affairs (including activation fee)</u>
  - 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.
  - o Award must be presented according to <u>Campus policy requirements</u>.
  - o Not included in the Entertainment approval process.

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





- o 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