Student Affairs Celebrations Policies and Guidelines

As part of the Division's overall refresh and recalibration of our policies and practices, we are taking a look at practices regarding celebrations and events.

The aim of this refresh is to:
1. Clarify and adhere to the policies that already exist
2. Ensure consistency and equity across the division
3. Be intentional about how we use our financial resources, while still building a culture of Pride, Trust, and Community

The aim of this document is not to suggest curtailing celebratory events, but rather to provide information that helps departments and event planners make informed decisions about how to hold these important events.

Business Meetings vs. Morale-Building Events

Business meetings have a clear agenda and/or business purpose, and the majority of the agenda is dedicated to discussing, collaborating on, or training on daily work. Business meetings events do not require advance (exceptional) approval.

Any gathering that does not have the majority of its activities focused on business (no matter what the event is called) requires exceptional approval, via the below process. Departments may choose to include celebrations or morale-building as one agenda item in a business meeting; however, departments should not attempt to avoid securing exceptional approvals by calling events that are purely celebration or morale-building "business meetings."

If your event is planned through the Business Operations Events Team, your planners will be able to help you evaluate whether your event requires exceptional approval, and help to secure those approvals.

University Policies on Morale-Building Events

PLEASE REFER TO BUS 79 FOR THE FULL POLICY: http://policy.ucop.edu/doc/3420364/BUS-79

Celebrations and team building events can be great ways to build relationships and culture on your team. Currently, however, the policies for these events are not always well-known or followed, which can lead to both confusion and inequity across the division.

Team celebrations and morale-building events require exceptional approval by the Vice Chancellor, per university policy.
- Exceptional entertainment forms must be submitted to the Vice Chancellor's office at least one week in advance of the event, and it is recommended to submit them at least one month before the event. Before submitting them to the Vice Chancellor, the proposed event should be reviewed and approved by the department director, and the AVC who oversees that area. If you have not submitted the forms one week prior to the event, expenses may not be reimbursed.
- Approvals are usually turned around within one business week, often sooner. While most exceptional events are approved, the Vice Chancellor's office will sometimes have questions or suggestions for the planners, to help ensure consistency and equity across the division.
- Birthdays, baby showers, wedding showers, work anniversaries, farewell or retirement parties for employees with less than 5 years' service, farewell parties for employees moving between campus departments, regardless of years of service, and welcome events (including meals) for new staff are not reimbursable.

Student Affairs Expected Practices
While the needs of departments will vary, here are some general benchmarks or guidelines for celebrations and morale-building events that should help departments plan their celebrations and events with an eye toward policy compliance and equity across the division.

Based on 2015-16 expenses, the typical team spends, on average, $200 per employee per year on business meetings and events. This includes everything from formal parties, off-site events, and celebrations, to standard business meetings. Departments should monitor average spending per employee on meetings and events, and attempt to stay below the $200/employee benchmark. You can monitor this number by dividing the amount spent and forecast in the "Meetings" line of your budget by the total headcount for your area.

Each unit within the division should also be mindful of overall spending per employee, knowing that an individual employee will likely attend meetings and events for their immediate team, their department, their unit, the division at large, and cross-cutting committees or working groups.

The Student Affairs Events Team and your Finance Analyst can be great supports for you as you plan. They recommend scheduling a meeting at the beginning of the year to plan out anticipated celebrations and events to budget effectively and seize potential efficiencies and savings.

Please note: In any cases where union contracts or other mandates or regulations require something different than what's in the guidelines below, please adhere to the contracts/mandates/regulations.

Guidelines and Suggestions for Types of Events

Team Celebrations
This includes things like celebrating achieving a goal or finishing a large project. As a reminder, personal celebrations (birthdays, anniversaries, graduations, etc.) should not be reimbursed by the University.

Guidelines

- Departments should aim to be purposeful and economical in the planning of their events. Exceptional approvals should contain specifics about what the event is, and why those activities were chosen. Where a less expensive alternative exists, planners should aim to use it whenever possible. Planners can work with the Events team to identify creative cost-savings.
- While not a hard and fast rule, based on past spending, it's expected that most food expenses for events will average out to less than:
  - $8 per person for Breakfast
  - $15 per person for Lunch
  - $23 per person for Dinner
- Here are some ideas for relatively low-cost celebrations that other departments have enjoyed in the past:
  - Potlucks or Semi Potlucks with departments supply main entrees and faculty/staff bring side dishes
  - Ice Cream Socials
  - Utilizing complimentary services for staff events i.e. LHS, Botanical Gardens, UC Bear Transit

Teambuilding

This includes activities like completing and sharing the results of a personality assessment as a team, discussions of how the team can best work together, and more in-depth getting-to-know-you activities that may help the team function more effectively.

Guidelines
- Departments should aim to be purposeful and economical when planning teambuilding activities. Exceptional approvals should include a rationale for why the planned activities were selected, and what the planners hope to accomplish.
- Consider using some of the excellent facilitators and trainers within the Division and the broader University community. This can provide professional development to the facilitators, while also helping to build your team.
- While attending events together, such as sporting events, concerts, festivals, and others, can be a great opportunity for team building, the cost of tickets for these events will not be reimbursed.

Holiday Gatherings
Recognizing and celebrating holidays can follow the norms, expectations, and needs of your organization, so parties and gatherings are certainly not the only way to celebrate.

Guidelines
- Consider coordinating with other departments and leadership within your area on holiday gatherings. Often, a staff member will be invited to a gathering with their immediate team, their department, their unit, and the whole division. Talk through ways to consolidate, being mindful of how much time and money is being spent in the aggregate.
- Consider less-expensive but festive and fun celebrations like:
    - Potlucks
    - Craft making parties - i.e. Holiday Ornament Parties, Snow globes
    - Community/Campus Volunteering
    - Gift Exchange
- Your department may prefer not to have a gathering, but rather to recognize a holiday in other ways such as with special notes to staff members or small gift cards.
- As you're planning, keep in mind that our staff is diverse, and staff members celebrate many different holidays and observances. Keep an open line of communication with your staff about how you are celebrating holidays.
- The Events team will work with departments in the fall to understand what gatherings and end of year meetings will be occurring to seek out efficiencies and savings

Retirements and Farewells
This includes celebrations of staff who are leaving Berkeley, whether due to retirement, taking a new position, or experiencing a layoff or position elimination.

Policy
- Retirement and farewell events are only reimbursable for employees who have completed 5+ years of service with the University
- Retirement gifts for employees with 5+ years of service should not exceed the following guidelines in total spend (plaques, gift cards, etc.)
    - 5 to 10 years of service -$200
    - 11 to 15 years of service - $250
    - 16 to 20 years of service - $300

- o 21 to 25 years of service $350
- o 25+ years of service $400
- *Note:* Gifts provided to employees in connection with birthdays, weddings, anniversaries, holidays, farewells, graduations and other occasions of a personal nature are not reimbursable per University policy.

PLEASE REFER TO BFB-G41 FOR THE FULL POLICY: http://policy.ucop.edu/doc/3420353/BFB-G-41

Guidelines
- If possible, consider planning joint celebrations for staff leaving at around the same time.
- In the past, most retirement and farewell parties have fallen in the range of $15 per attendee. While this may be slightly more or slightly less depending on the tenure, level, and reach of the employee's work, you should aim to keep in this ballpark.
- Retirement and farewell events should reflect the employee's wishes, while also being fiscally responsible.

Implementation and Procedures

Staff are expected to adhere to both the spirit and the letter of established University policy. Departments that consistently or egregiously miss the mark with regard to policy will be identified and asked to monitor their decisions with more care.

Business Operations runs quarterly events reports. These reports are being re-designed to provide clearer and more actionable benchmark data for departments to use when making decisions. Budget managers should review these reports to ensure that their spending on celebratory events is falling within policies and guidelines.