

FAQ: New restrictions on the use of UCOP funds for UCOP retirement events, retirement gifts, morale building events and the STAR Program

Does the restriction against using UCOP funds for retirement events apply only to food and beverages, or any expense related to the event?

No UCOP funds may be used for any aspect of a retirement recognition event. This includes, but is not limited to, any food and beverages, paper plates or cups, decorations, space rental fees, gift cards, or gifts.

If UCOP funds cannot be used to buy a retirement gift, may I still give a Length of Service Award?

Yes. "Length of Service Awards" (i.e., a tangible desk medallion with UC seal, paperweight with UC seal, lapel pin with UC seal, tie tack with UC seal) may be presented to an employee for recognized length of service periods to the University. Please remember that no other gifts may be purchased with UCOP funds.

I'm planning a retirement event for a valued employee with many years of service. We will honor the restriction on use of UCOP funding and may have a potluck or an event funded by personal funds. Can the Event Services Group still help me with planning the event?

Yes. UCOP Event Services Group is available to help plan these events.

I've already submitted an approved [STAR award](#) nomination for an amount exceeding \$500. What will happen to it?

All STAR awards that have not been paid are limited to \$500 and subject to the new criteria for "exemplary performance" (i.e., a special project above and beyond the normal scope of an employee's job). This means any STAR award nomination over \$500 that was already submitted but not yet approved will be returned to the nominating department for adjustment to \$500 or less. In addition, nominations that are too general or within the normal scope of the employee's job will be returned to the nominating department and will not be approved. STAR awards are now capped at one per person or team per fiscal year.

Are these new guidelines temporary?

These restrictions do not expire. We will continue to examine all uses of UCOP funds, existing policies and procedures, and our current activities. New guidance may be issued in the future.

Do these restrictions only apply to "state funds?" Can I use Searles or my administrative fund? What about restricted funds?

These restrictions for retirement events and gifts, morale-building events and STAR awards apply to all UCOP funds, regardless of fund type or source.

I have a large department of 75 people and want to hold an employee morale building event. The department next to me only has 20 people and would get up to \$380 (\$19 per person) as a budget limit. If I'm capped at a maximum budget of \$500, that's less than \$7 per person, which doesn't seem very fair.

Departments are strongly encouraged to consider lower-cost alternatives for morale-building events. If an alternative is not feasible, departments may submit an “exception request” to Executive Director of UCOP Operations Thera Kalmijn for review at least two months in advance of the event and prior to committing any UCOP funds. The “exception request” should include a brief description of the event, the estimated budget, and details on what lower-cost alternatives were considered and why they are not feasible. These requests will be reviewed on a case-by-case basis. Approvals of these requests are not guaranteed.

I already have a morale-building event that is paid for with UCOP funds (or a nonrefundable deposit given) but has not yet occurred. Do I need to forfeit this event entirely?

Please treat this as an “exception request” and submit it to Executive Director of UCOP Operations Thera Kalmijn for review as soon as possible. The “exception request” should detail what costs have already been incurred or committed, and alternatives for containing the cost to the new policy limits and the financial consequences of modifying or cancelling the event. If additional costs in excess of \$19 per person or \$500 total can be avoided by either modifying or cancelling the event, the likely recommendation will be to alter the event. “Exception requests” will be reviewed on a case-by-case basis, and no approval is guaranteed.

I’m fine with this new policy, but I’m having trouble coming up with good low/no cost ideas for morale-building or retirement recognition events. What can I do?

There are many options available, and a list of specific ideas will be published soon, benefitting from the input and involvement of UCOP Staff Assembly leadership, affinity group leadership, human resources, culture diversity and engagement, event services and others.