

CALIFORNIA STATE UNIVERSITY, FULLERTON

DIRECTIVE 11 DOCUMENTATION AND APPROVAL FORM

Procurement Card Month
 Name (Requestor or Procurement Cardholder) Name (Preparer) Date Department Extension Requisition Number
 Operating Fund (Fund 485) Fund 948 CSUF ASC Philanthropic Foundation ASI

Documentation Description/Definition (Refer to the D-11 Administrative Guidelines for details)	Fund Restrictions (If Any)	Amount	Name of Event/Description of Gift or Item List of Attendees/Guests/Recipients and their Affiliations *
Awards Items of tangible personal property given in recognition of service or achievements directly benefiting the University. Gift card and gift certificates do not qualify as items of tangible personal property.			
Non Student Awards Including faculty/staff retirement, length of service (at least 5 years) or faculty/staff/donor/volunteer or community member recognition awards.	Funds Held in Fund 948 (Other Than Fund 485) or Auxiliary Funds		
Student Awards	All Funds Allowed		
Entertainment Services Expenditures incurred in connection with events or activities that are primarily social or recreational (e.g., equipment and venue rental, décor, music, performers).	Funds Held in Fund 948 (Other Than Fund 485) or Auxiliary Funds		
Event Attendance Attendance at a university-sponsored or community event when an individual's attendance is necessary for the success of the event or directly relates to the individual's responsibilities and role at the university. Event attendance also includes spouses/partners of university employees when it is customary or socially acceptable for spouses/partners to attend.**	All Funds Allowed		
Food and Beverage (Excluding Alcohol) Including but are not limited to meals (catered or restaurant) and light refreshments (e.g., beverages, hors d'oeuvres, pastries, and/or cookies). Events may include meetings, conferences, receptions or other events.			
Food and Beverage at Events Attended By Official University Guests (Please refer to Maximum Per-Person Rates for Hospitality Meals and Light Refreshments document)	All Funds Allowed		
Food and Beverage at Events Attended Only By University Employees (Please refer to Maximum Per-Person Rates for Hospitality Meals and Light Refreshments document)	Funds Held in Fund 948 (Other Than Fund 485) or Auxiliary Funds		
Gifts Items of value given or bestowed upon an individual, group, or entity with the expectation of a benefit accruing to the University, including donor or volunteer recognition; get well or memorial floral or other arrangements or memorial donations made on behalf of the university in the event of the a serious illness, injury or death of a university employee, an individual external to the university who had a close educational, community, business, or philanthropic relationship with the university, or a student. Memorial floral or other arrangements or donations also may be provided in the event of a death of a member of a university employee's immediate family.	Funds Held in Fund 948 (Other Than Fund 485) or Auxiliary Funds; Memorial donations are only permissible via Auxiliary Funds		
Fundraising Defined as efforts with the goal of securing gifts and other contributions to the Cal State Fullerton Philanthropic Foundation, which ultimately benefit the University. Shall NOT be used to pay for the participation of employees or official guests at university fundraising events.	All Funds Allowed		
Promotional Materials Items of nominal value and bear the University logo or other University symbol distributed to promote the name or image of the University, provide information, or enhance University productivity.	All Funds Allowed		
Memberships in Social Organizations Include university clubs, athletic clubs, civic organizations and other membership organizations that provide a venue for hosting hospitality events or a means for promoting goodwill in the community. Memberships in business leagues, chambers of commerce, trade associations and professional organizations are considered a regular business expense and are not governed by this policy.	Funds Held in Fund 948 (Other Than Fund 485) or Auxiliary Funds		
Alcoholic Beverages	Funds Held in Fund 948 (Other Than Fund 485) or Auxiliary Funds***		

*At the discretion of the Division Head or designee, groups names and/or affiliations may be utilized to identify guests/attendees (e.g., Academic Senate Executive Committee Members) rather than names and titles of individual attendees.
 **D11 approval by the Division Head or designee confirms event attendance by an employee and, as appropriate, by the employee's spouse/partner satisfies these requirements. D11 event attendance requirements do not apply to meetings or conferences covered by an approved travel authorization.
 ***Subject to applicable laws and agreements (Fund 948), policies and restrictions established by the auxiliary organization and if applicable the agreement establishing permissible use of funds (auxiliary organization funds).

Approval of Division Head or Designee (Delegation of approval authority must be approved by the Division Head and be on file in Finance and each auxiliary organization.) A Division Head may elect to designate more than one individual to authorize D11 expenditures on his/her behalf up to \$1000. It is the responsibility of the approver to ensure all funding source restrictions are observed.

By my signature, I certify that documentation is complete per the terms of Directive 11 and that the requirements of the pertinent section of Directive 11 have been met.

Division Head (VP or equivalent) or Designee Approval Date