Finance Procedural Statement: Official Functions

Effective Date: December 1, 2022 (see Revision Log for what changed on this date; use Questions & Feedback form to interact with University Controller staff)

Introduction

This procedural statement sets forth university requirements for use of the Official Function form when food/beverage is purchased for an official function, or when alcohol is purchased for an official function or CU-hosted conference.

For information on how to purchase food, beverage, catered services, meeting facilities, and other items related to official functions, see the How to Buy Official Functions purchasing instructions.

Procedural Statement

The most common types of official functions are:

- Community relation functions-external: directly related to the University’s instructional, research, public service, or health care mission
- Donor cultivation, solicitation, and stewardship official functions: require use of advancement/development funds (Fund 36 SpeedTypes) or appropriate gift funds (Fund 34 SpeedTypes with a Gift Purpose Code 2 of Y, designating that the SpeedType is restricted for purposes including entertainment, donor cultivation, or personnel recruitment)
- Employee recognition/appreciation events and retirement functions
- Goodwill functions: for official guests/volunteers to indicate goodwill or esteem
- Multi-unit or multi-campus events: participating units may not report to the same officer and events may not occur more often than monthly
  - Single-unit (reporting to the same officer) events require approval from appropriate vice chancellor/vice president
  - Meetings more frequent than monthly require approval from appropriate vice chancellor/vice president
- Recruitment functions: to enlist new employees, faculty, post-/pre-doctorates, student athletes, etc. (activities must be directly related to work position/field of study/reason for recruitment – exceptions may be authorized by appropriate officer)
- Student functions: hosted for students, and directly related to student/educational development (e.g., student recognition, student recruitment, and student program development)
- Training functions: to enhance staff knowledge or to educate employees, associates, or other individuals (must have a written agenda, subject matter/focus of activities must be directly related to work environment/work tasks)
For purposes of determining the use of the Official Function form, the cost of an official function is the cost of university-purchased food/beverage for personal consumption and related taxes/tips/fees.

The organizational unit must complete the Official Function form if:

- The University purchases alcoholic beverages in any dollar amount for an official function or for a CU-hosted conference (requires compliance with university and campus-specific policies/procedures on alcoholic beverages); or,
- The total cost of the official function exceeds $500 (if the total cost of an official function exceeds $10,000 the Official Function form requires approval by appropriate officer); or,
- Regardless of total cost, the per-person cost of an official function exceeds $115 (requires approval by appropriate officer – it is expected that, as stewards of university resources, employees continue to stay well below this threshold).

Furthermore, the requirements of this procedural statement must be considered in conjunction with any campus-specific policies on alcoholic beverages.

Exceptions

The Official Function form is not applicable to the following cases:

- Purchases of strictly business materials (copies of handouts, room/instructional equipment rentals, etc.) for workday-type functions such as staff/faculty meetings
- Purchases of food/non-alcoholic beverage for conferences hosted by the University
- Purchases of food/beverage for fundraising events (for these, see instead the Fundraising Authorization form)
- Purchases of food/beverage for ordinary student residential life activities
- Purchases of food/beverage for research/instructional projects
- Purchases of food/beverage for resale

Official Function Documentation in the Concur Travel & Expense System

For reconciling Procurement Card, Travel Card, or personal expense reimbursement transactions, a separate Official Function form is not required since official function-related information is entered directly in Concur and routing for approval is managed within the system.

Related Administrative Policy Statements (APS) and Finance Procedural Statements (FPS)

- APS Alcoholic Beverages Purchased for University Events [3]
- FPS Alcoholic Beverages Purchased for University Events [4]
- FPS Recognition and Training [5]
- FPS Sensitive Expenses [6]

Forms and Other Resources
Revision Log

- Updates 12/1/2022: clarified OF form requirements when purchasing alcohol for official functions/CU-hosted conferences; increased per-person-cost threshold for requiring officer approval from over $85/person to over $115/person (*this adjusts for inflation since 2008, when the $85 threshold was established*); added stewardship language on per-person food/beverage costs; additional minor edits aligning descriptions of official functions with language used in FPS Sensitive Expenses.

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