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Finance Procedural Statement: Official Functions [1]

Effective Date: May 1, 2025 *(see Revision Log for what changed on this date)*

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. Official Functions are defined as a meeting, meal, or other function that is hosted by an organizational unit, attended by guests and/or associates or employees, and held for official university business.

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 [2] 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.

The organizational unit must complete the Official Function form if any of the following applies:

- For an official function or for a CU-hosted conference: the University purchases alcoholic beverages in any dollar amount. Requires compliance with university and campus-specific policies/procedures on alcoholic beverages.
- For an official function: The **total** cost of food/beverage exceeds $500. If the total cost of food/beverage, including tax/tip/fees, exceeds $10,000 then the Official Function form requires approval by an appropriate officer.
- For an official function: Regardless of total cost of food/beverage, the **per-person** cost of food/beverage exceeds **$125, pre-tax/tip/fees**. 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

Unless approved by the appropriate campus controller [3], there are no exceptions to this procedural statement.

Official Function Documentation in the Concur Travel & Expense System and in CU Marketplace

When reconciling Procurement Card, Travel Card, or personal reimbursement expenses, official function-related information is entered directly in Concur and routing for appropriate approvals is managed within the system. Therefore, CU System policy does not require a separate Official Function form in these cases. Note that campus/department policies may still require the separate form.

When processing purchase requisitions, routing for organizational unit and campus alcohol approval is managed within CU Marketplace. Officer approval, however, is not part of CU Marketplace workflow. Therefore, if your official function's total food/beverage cost exceeds $10,000 (including tax/tip/fees), or if the per-person food/beverage cost exceeds $125 (pre-tax/tip/fees), you must attach the officer-approved Official Function form to your requisition.

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

- APS Alcoholic Beverages Purchased for University Events [4]
- FPS Alcoholic Beverages Purchased for University Events [5]
- FPS Recognition and Training [6]
- FPS Sensitive Expenses [7]

Forms and Other Resources

- Official Function (OF) form [8]
- How to Buy Official Functions [2] purchasing instructions

Revision Log

- Updates 5/1/2025: Increased per-person-cost threshold for requiring officer approval from over $115/person (including tax/tip/fees) to over $125/person (pre-tax/tip/fees); clarified use of Official Function form and routing in Concur and CU Marketplace; added definition of Official Functions; additional minor edits.
- Updates 4/1/2025: Identified authority to approve exceptions as belonging to the appropriate campus controller.
- 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 [7].
- Supersedes PSC Procedural Statement Official Functions dated 3/1/2019.

Have a question or feedback?

For questions or feedback contact

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