

## **Finance Procedural Statement: Official Functions** <sup>[1]</sup>

**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](#) <sup>[2]</sup> 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](#) <sup>[3]</sup>
- [FPS Alcoholic Beverages Purchased for University Events](#) <sup>[4]</sup>
- [FPS Recognition and Training](#) <sup>[5]</sup>
- [FPS Sensitive Expenses](#) <sup>[6]</sup>

## **Forms and Other Resources**

- [Official Function \(OF\) form](#) <sup>[7]</sup>
- [How to Buy Official Functions](#) <sup>[2]</sup> purchasing instructions

## 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](#) <sup>[6]</sup>.
- Supersedes PSC Procedural Statement Official Functions dated 3/1/2019.

## Have a question or feedback?

## Questions & Feedback <sup>[8]</sup>

### Feedback or Question \*

Your Name

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This question is for testing whether or not you are a human visitor and to prevent automated spam submissions.

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Groups audience:

Controller

Source URL:<https://www.cu.edu/controller/procedures/finance-procedural-statements/finance-procedural-statement-official-functions>

## Links

[1] <https://www.cu.edu/controller/procedures/finance-procedural-statements/finance-procedural-statement-official-functions> [2] <https://www.cu.edu/psc/how-buy-official-functions> [3] <https://www.cu.edu/ope/aps/4018> [4] <https://www.cu.edu/controller/procedures/finance-procedural-statements/finance-procedural-statement-alcoholic-beverages> [5] <https://www.cu.edu/controller/procedures/finance-procedural-statements/finance-procedural-statement-recognition-and> [6] <https://www.cu.edu/controller/procedures/finance-procedural-statements/finance-procedural-statement-sensitive-expenses> [7] <https://www.cu.edu/psc/forms/official-function> [8] <https://www.cu.edu/controller/forms/questions-feedback-0>