

# CMDI Official Function Policies and Procedures

The University of Colorado specifies that any food or beverages purchased with University funds must be for an Official Function. These guidelines apply to all food and beverage purchases charged to any speedtype, except when an individual is in travel status.

- The total cost for an Official Function cannot exceed \$125 per attendee. This total includes food, beverage, space rentals, taxes (if applicable), and tips. As stewards of university resources, employees are expected to keep costs well below this threshold.
- Alcohol expenses may not exceed 50% of the overall cost of the Official Function.
- Expenses for Official Functions can be divided among multiple speedtypes. When reconciling alcohol purchases, it is necessary to use a gift fund speedtype beginning with “134,” which has been designated for alcohol purchases. Department administrators and CMDI Finance can provide this speedtype.

All Official Functions must align with the types of Official Functions categorized below.

## What Expenses Are Permitted?

The university’s policies govern which expenses are allowable to ensure accountability and adherence to budgetary constraints. Here are some common categories:

- **Food and Beverages:** These are generally permitted for official functions that last more than a few hours or cross typical mealtimes.
- **Supplies and Materials:** Purchasing items directly related to the event, such as educational materials, printed agendas, and office supplies, is usually acceptable.
- **Venue Rentals:** If hosting an event off-campus is necessary, rental costs for appropriate venues are generally allowed but may require additional approval.
- **Decorations and Entertainment:** Only in limited cases—such as large public events or significant university celebrations—may decorations and entertainment be covered. Approval must align with policy on sensitive expenses.

## Acceptable Types of Official Functions:

- Employee Recognition / Appreciation Events: Holiday parties, retirement parties, recognition events
  - A staff appreciation meal is an infrequent, unique, official function that is hosted and attended by the head of an organizational unit to show appreciation to a continuing or departing staff member, or a group of staff members.
  - Generally, such events should be associated with a specific performance trigger and would not be expected to occur more often than once per semester.
- Recruitment Functions: Hosted to enlist new staff, faculty, or graduate students
- Student Functions: Hosted for students or by students and directly related to student/education development. The majority of attendees should be students.
- Training Functions: Events to enhance staff knowledge or to educate employees, associates, or other individuals
  - Must have a written agenda attached to the expense as an additional receipt and the subject matter/focus of activities must be directly related to the team's work environment/work tasks
- Community relations function: Events directly related to the University's instructional, research, or public service mission. This will usually entail a meeting with non-employee members of an organization with whom CU shares mutual goals and would like to plan out future collaborations.
- Goodwill Functions: For official guests/volunteers to indicate goodwill or esteem (typically a meal with an invited speaker for an event)

## Helpful Links:

- [Finance Procedural Statement: Official Functions](#): Outlines the formal policies surrounding official functions, including allowable expenses and event types.
- [Finance Procedural Statement: Sensitive Expenses](#): Provides details on which expenses are considered sensitive, with specific guidance on food, alcohol, and entertainment.
- [Finance Procedural Statement: Recognition and Training](#): Guidance on planning recognition events and training sessions.
- [Finance Procedural Statement: Alcoholic Beverages Purchased for University Events](#): Sets forth the parameters for using university funds to purchase alcoholic beverages for personal consumption at university events.
- [Official Function \(OF\)](#): Download the form from this link and review examples for quick reference.

- <https://www.colorado.edu/controller/cu-official-function-form-guide>

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*Questions? Contact [CMDIFinance@colorado.edu](mailto:CMDIFinance@colorado.edu)*

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## Official Function Form:

If paying with a P-card or personal card (seeking reimbursement):


- You **do not** need to fill out an official function form unless the cost of food/beverage exceeds \$125 per person (pre-tax/tip/fees).

If paying by PO and invoice, you must send a quote for the event along with an [Official Function Form](#) to CMDI Finance no less than 2 weeks in advance.

- If the vendor requires a signature on a contract, a representative from PSC is the only one authorized to sign on behalf of the University. Please submit the quote, official function form, and unsigned contract to CMDI Finance, and they will submit the documents to PSC for signature.
- Deposit: If the vendor requires a deposit, we can either pay by check through Marketplace, or by P-card.
- Officer Signature: If this is needed for your official function, CMDI Finance will obtain this signature for you.

When filling out the Official Function Form, please complete the top section, as highlighted below. Leave the “Approval” section blank.

Sample Official Function Form – Please fill out the applicable sections noted in the red boxes.

 <b>University of Colorado</b> <small>Boulder   Colorado Springs   Denver   Anschutz Medical Campus</small> <b>Office of University Controller (OUC)</b>		<small>Effective Date: 12/01/2022</small> <b>Official Function (OF)</b>													
<b>Purpose:</b> Use this form when: 1. alcoholic beverages are purchased (in any dollar amount) for an official function or CU-hosted conference; or 2. for an official function, the total cost of food/beverage exceeds \$500; or 3. for an official function, the per-person cost of food/beverage exceeds \$115 (regardless of total cost). Official functions that do not exceed these amounts do not require the OF form but must still comply with all applicable university policies.		<b>Concur expenses:</b> For purchases made using the Procurement Card or Travel Card, or for personal reimbursements, this paper form is <b>NOT</b> required. Alcohol and official function information is entered directly into Concur for each expense.													
Today's Date: <input type="text"/> Requisition # (if applicable): <input type="text"/>		<b>Official Function Information</b>													
<b>Organizational Unit Contact Information</b> Organizational Unit: <input type="text"/> Contact Person: <input type="text"/> Campus Phone: <input type="text"/> Campus Mailbox: <input type="text"/> Email Address: <input type="text"/> <input type="checkbox"/> Admission/registration fee <i>If fee is charged, sales tax applies.</i>		Event Name: <input type="text"/> Type of Event: <input type="text"/> Event Business Purpose: <input type="text"/> Event Date: <input type="text"/> Event Location: <input type="text"/> Hosting Unit: <input type="text"/> Responsible Individual: <input type="text"/> Total Cost (including Food, Beverage, and Related Taxes/Tips): <input type="text"/> # of Persons Attending: <input type="text"/> Cost per Person: <input type="text"/>													
<b>Campus-specific alcohol information is located on University Risk Management's website: <a href="#">University Events with Alcohol</a></b>															
<b>Accounting Information</b>															
<table border="1"> <thead> <tr> <th>SpeedType</th> <th>Account</th> <th>Amount</th> </tr> </thead> <tbody> <tr> <td></td> <td>Leave Account</td> <td>\$0.00</td> </tr> <tr> <td></td> <td>Blank for</td> <td>\$0.00</td> </tr> <tr> <td></td> <td>CMDI Finance</td> <td>\$0.00</td> </tr> </tbody> </table>	SpeedType	Account	Amount		Leave Account	\$0.00		Blank for	\$0.00		CMDI Finance	\$0.00	<b>Official Function alcohol purchases:</b> Use a Fund 34 SpeedType, with Gift Purpose Code 2 (GPC2)=Y, and Account 550102 (OF's with Alcohol). * Development official functions may also use a Fund 36 SpeedType. <b>Conference alcohol purchases:</b> Use a Fund 20 or 29 SpeedType. (May also use Fund 34 SpeedType with GPC2=Y.) The conference brochure must disclose information about the provision of alcoholic beverages.		
SpeedType	Account	Amount													
	Leave Account	\$0.00													
	Blank for	\$0.00													
	CMDI Finance	\$0.00													
<b>Official Function Only: Attendee Name &amp; Relationship with the University</b> <i>For up to 10 attendees: list names and relationships, e.g., Chris Jones (UCCS faculty member); Mary Doe (recruit).</i> <i>For more than 10 attendees: list number of individuals and describe the relationship, e.g., 10 UCB students; 25 affiliates.</i>															
<b>Approval</b>															