Departmental Procedure: SA-SL9 Purchase Form Procedure

CF Administrative Procedure: 7.06

Effective Date: 7/26/07
Revised Date: 7/9/14
Revised By: M. McGee

Department: Student Life

Personnel Involved: Office of Student Life, Club and Organization Advisors, Business Office

Person Primarily Responsible: Director of Student Life

Objective: For student clubs and organizations to request access to their club/organization funds for spending.

Procedure:

Purchase Request

A. When a purchase is requested, the Purchase form (SA-SL8) must be completed and submitted to the Office of Student Life no later than 10 business days prior to the event purchase. If this purchase is connected to an event, it is best to submit both forms at the same time to ensure payment prior to the event. This form should be filled out electronically and then printed for appropriate signatures. Note that both a club officer and advisor must approve the purchase. Be sure to attach all back-up documentation to support the purchase.

- This form must be submitted to the Office of Student Life located at least 10 business days prior to the date needed. Include general information about the event/purchase. If this is an SAB event that you will be participating in or just a purchase of supplies, only the Purchase form is required. If this is an event that your club will be hosting, an Event Planning and Approval form (SA-SL5A) must be approved prior to any purchase.
- If shopping for items will be required, please confirm dates and times with the Office of Student Life. Please remember that students should always be accompanied by a CF staff member when shopping for items for an event.
- Please choose the type of request, date needed, and the amount. The budget will be reviewed and if funds are available the request will be approved based on supporting documentation. Note that purchases from Fund 06 accounts must have meeting minutes for supporting documentation.
- Note that when unplanned budget items are requested, approval for this must be reflected in meeting minutes and the minutes must be attached to this form.
• Vendor information is required for all purchases. A “vendor” is the business/individual being paid for the service. Be sure to fill out all necessary information regarding the vendor. New vendor information can be obtained through the Purchasing office. OSL staff can assist with the process of obtaining a vendor ID but must have the necessary information prior to the completion of this form. This includes name, address, contact number and federal identification number. If the vendor is a staff member or a student, please list their CF ID number as the vendor ID. Note that a vendor ID is not required for a Purchasing Card purchase.

• Please keep in mind that getting quotes when purchasing is helpful to ensure that you get the best prices. Quotes must be attached to this form prior to placing any orders. When approved, purchasing can take place once an invoice is received in the Office of Student Life along with a Purchase form.

• When bringing speakers or special events to campus, note that a copy of a signed contract and the Agreement to Provide Professional Services must also accompany this form when submitted. (This is also part of the event planning and approval process). If you have more than three vendors, attach an additional form.

• The Office of Student Life staff will review all information and purchases will be approved or denied as deemed appropriate. The advisor will be notified that the purchase has been approved or denied. Note that incomplete forms will be returned and forms not submitted in a timely manner may be denied.

• If applicable, list the delivery location for the purchase (ex.: pizza delivery for a meeting, event, etc.)

B. The Office of Student Life will fill out the information in the area labeled Office Use Only. Appropriate information will be filled out as the process is completed. A copy will be sent to the club/organization advisor and the original will remain in the club/organization file in the Office of Student Life.