PURCHASING

Contracts, P-Card Purchases, and more
What is my Budget?

Zero-based budgeting (ZBB) is a method of budgeting in which all expenses must be justified for each new period. Zero-based budgeting starts from a "zero base," and every function within an organization is analyzed for its needs and costs.
Use Excel for Budget Tracking

<table>
<thead>
<tr>
<th>Vendor</th>
<th>EVENT</th>
<th>Item</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Glennovan James</td>
<td>Kick Off</td>
<td>DJ</td>
<td>$225.00</td>
</tr>
<tr>
<td>Popoyes</td>
<td>Kick Off</td>
<td>Food</td>
<td>$506.84</td>
</tr>
<tr>
<td>StarQuix</td>
<td>Kick Off</td>
<td>Magnets</td>
<td>$502.89</td>
</tr>
<tr>
<td>StarQuix</td>
<td>Kick Off</td>
<td>Fans</td>
<td>$325.00</td>
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<tr>
<td>Campus Speak</td>
<td>LeadMDC</td>
<td>Speaker</td>
<td>$3,500.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>$5,059.73</td>
</tr>
</tbody>
</table>
Ways to make purchases

- Online orders
- In Store purchases (this option may not be available unless you are a Pcard holder)
- Purchase Order
- On campus catering
What can I pay for

- You can purchase anything for the benefit of students
- If you are using Student Life fees, you may not use funding to pay for anything for staff or faculty
- Most commonly requested
  - Food
  - Promotional Items
  - Speaker Fees
  - Books
Promotional Items w/ a PURPOSE

- You CAN purchase promotional items, but they should be for a reason
- T-Shirt, directs them to the Black History Month website
- Planner that has the calendar of events built into it
- Coffee Mug that has empowering women quotes on it
- Bracelets that direct them to social media where they can find the events listing
- A reusable water bottle for an environmental event
- Padfolio for a professional development workshop, speaker series, or career readiness event
Student Life Funded Activities

- Hispanic Heritage Month
- Black History Month
- Women’s History Month
- Pride Week
Purchases over $999.00

- Anything over $999.00 (and often purchases less than) should be made with an Agreement for Services via Purchase Order
- Step 1- Identify if the company/restaurant/individual is a vendor

- **On Peoples Soft follow this pathway**
  
  Favorites-----Main Menu----- Financials----- Suppliers----- Supplier Information----- Add/Update----- Review Suppliers
What if they are NOT a Vendor

- Simply get an INVOICE and a W9
- Make sure the name of the company and address match on both documents
- Send to RonaldRodriguez and ask him to add the new vendor in the system
  - rrodri23@mdc.edu
- Your vendor number will be active in 2-3 days
  - Note the Vendor Number on the Invoice for Service
Things to Note

- You can not pay an INDIVIDUAL more than $500.00
- Even an Honorarium requires that the Agreement for Services be completed
- Late requests will not be processed for payment
- If the vendor does not supply the paperwork or sign the agreement, they will not be paid
Agreement for Services

- Must be completed 4 weeks in advance of service

New Vendor
- Resume (required for an Individual not a company)
- W9
- Invoice
- Rationale/Justification

Returning/Existing Vendor
- Invoice
- Rationale/Justification
Chair v Student Life Responsibility

- The Chair (or appointee) is responsible for
  - Securing Quote
  - Establishing Vendor Number
  - Collecting Documents (Resume, W9, Invoice)
  - Submitting all materials to Student Life 4 weeks in advance of service
  - Securing Vendor Signature on Agreement for Services

- Student Life is responsible for
  - Creating Agreement for Services
  - Securing campus administration signatures
  - Submitting Invoice for payment
Purchasing Card Purchases

- “Shopping Trips” may not be realistic, so you should plan to have things order online and/or delivered
- We can buy items online through any website, simply send over the links for purchase
ACCESSING LEARNING

Start with the end in mind....
What do you want them to LEARN
As a result of attending this program, participants will acquire the ability to:

- Bridge the gap between senior management & the front line.
- Lead across organizational or geographical boundaries.
- Learn the art of collaboration.
- Solve complicated problems & take wise action in complex, rapidly changing conditions.
- Manage stress, build resiliency & leverage multiple life roles.
- Build a network of supportive leaders to continue development.
Sample Question

- This workshop/program increased my awareness of the importance of social enterprise
- Which of the following is a social enterprise?
  - Recyclebank - rewards people for taking everyday green actions with discounts.
  - VerTerra Dinnerware – sustainable disposable dinnerware made from banana leaves.
  - x-runner Venture - provides waterless toilets to families that do not have standard toilets.
  - All of the above
Satisfaction v Learning (perceived learning)

- Rate your level of satisfaction with the program.
- Rate your likeliness to attend future events such as this.

- This workshop has enhanced my ability to communicate effectively.
- This workshop has increased my understanding of leadership character.