

## INSTRUCTIONAL PROCEDURES

CSFPF has authority to enter into contracts, as well as procure goods and or services on behalf of the University using the procedures established below:

**For a CSFPF Purchase Order (PO), the following requisition request steps must be taken:**

1. Download CSFPF Requisition Request form the CSFPF website: <http://foundation.fullerton.edu/forms/>
2. Complete the Requisition Request form by ensuring the following information is provided:
  - Vendor information (New vendors must complete a VDR 204 or W9)
  - Requester Information
  - Description and justification of the good/service to be purchased
  - CSFPF account number and object code
  - Total amount to be paid for good/service (include sale tax, delivery, and other applicable fees)
  - If applicable, attach compliance documents (D11, IT Authorization, Insurance, etc.)
  - Authorized Signer reviews, signs and dates (two authorized signatures are required for requests over \$3,000)
  - Attach a valid quote, initial contract/agreement (made out to CSFPF) and any other supporting documentation, which may help explain/justify the expenditure.
- Additional requirements may apply should your request fall under the following:
  - Purchases of goods or services with matters of legal interpretation, liability risk, hazardous materials, international contracts, multi-year contracts, and or purchase of \$5,000 or more
  - Purchases of goods or services with a total value of \$25,000 to \$50,000 will require three or more information quotes in writing.
  - Purchases of goods or services greater than \$50,000 will require a Request for Proposal (RFP) through CSUF's Contracts & Procurement Department. Contact CSFPF for further instructions.
  - **NOTE:** Goods and or services that fall under the conditions listed above must have the contract made out to ***Cal State Fullerton Philanthropic Foundation AND California State University, Fullerton.***
3. Submit the Requisition Request form and the necessary documentation to CSFPF in CP-850

CSFPF generally requires a minimum lead-time of 15 business days to process a complete Requisition Request. However, contracts for large amounts or requiring additional approvals from other campus units (i.e., IT, C&P, etc.) may require up to 25 business days for review and approval.

***For additional information regarding the procurement process, please reference the CSFPF Procurement Policy on the Philanthropic Foundation website: <http://foundation.fullerton.edu/policies-forms/>***