

*This form is used to request an exception to a Foundation Policy and must be approved prior to making any purchases.
Request deviating from the CSFPF Account Agreement/Purpose will be denied.*

REQUESTER INFORMATION

Requester's Name: _____ Today's Date: _____
 Email Address: _____ Phone/Ext: _____
 Department/Division: _____ Campus Mail Address: _____

REQUEST FOR EXCEPTION

Exception being requested for: Postage/Delivery Service Payment for a Service
 Emergency Services Sponsorship/Donation Other: _____

Provide a detailed explanation of why an exception is needed and describe any items to be purchased or paid (please attach supporting documentation (i.e., formal/informal quotes, statement, contracts, etc.) if available):

Amount: _____ Will a Foundation Card be used? Yes No

If yes, provide Cardholder's name: _____

Account Name: _____ Account Number: _____

AUTHORITY APPROVAL

Two signatures required if the total amount is over \$3,000. Signatures must match those on file. Under no circumstances may the indicated requester or cardholder authorize this request, regardless of their account signing authority.

I have reviewed this exception request and certify that it meets the educational mission, CSFPF and CSUF Policies, and complies with the CSFPF Account Agreement. My signature ensures the exception is properly substantiated, serves a clear business-related purpose, and has no personal benefit.

Approving Official	Print Name _____	Title _____
	Signature _____	Date _____
Authorized Account Signer	Print Name _____	Title _____
	Signature _____	Date _____
Authorized Account Signer	Print Name _____	Title _____
	Signature _____	Date _____

CSFPF Use Only	

Date Received	
_____	_____
CSFPF Approval	Date

Please submit completed form and supporting documentation to CSFPF in CP-850.

For questions, call (657) 278-2789 or email, foundation@fullerton.edu.

INSTRUCTIONAL PROCEDURES

Exceptions to a Foundation Policy must be pre-approved prior to making any purchases or payments.

For consideration of an exception to a Foundation Policy, the following steps must be taken:

1. Download CSFPF Exception to Policy Form from the CSFPF website:
<http://foundation.fullerton.edu/forms/>
2. Complete the CSFPF Exception to Policy Form by ensuring the following information is provided:
 - Requester Information
 - Request for Information
 - Select an “Exception being requested for” category.
 - Provide detail explanation of why an exception is needed and description of items to be purchased or paid.
 - Provide a dollar amount association with the exception.
 - Indicate whether a Foundation Card will be used to make the purchase or payment and provide the Cardholder’s name.
 - Identify the CSFPF account name and number that the expense will be applied.
 - Authorized Signer reviews, signs and dates (two authorized signatures are required for requests over \$3,000).
 - UA Development Official (Executive Director or Director of Development, or UA AVP) reviews, signs, and dates.
3. Attach supporting documentation which may include but not necessarily limited to:
 - Bill/statement/invoice
 - Contract
 - Formal/informal quote
 - Receipt
4. Submit the CSFPF Exception to Policy Form and supporting documentation to CSFPF Accounting Services in CP-850.

NOTE: Purchases/payments may not deviate from the Foundation account agreement/purpose and IRS/Financial Aid reporting guidelines will be followed. If approved, the CSFPF Exception to Policy Form must be attached to a Foundation Check Request or a Cardholder’s Foundation Card Reconciliation packet along with CSFPF/CSUF compliance documents (if applicable) as part of the submission.

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