



University Procurement Guidelines

(A Brief Overview of University Policies Related to Purchasing, Payment, and Reimbursement)

A. Purchases of Non-Travel Related Goods and Services (< \$500)¹

1. A P-Card should be used for purchases of all goods/services costing less than \$500.
2. Office supplies must be purchased through the University's on-line account with Staples Business Advantage, unless permission to buy elsewhere is obtained in advance from the Purchasing Office.
3. Any purchase of furniture, computer equipment, or other electronics (regardless of cost) requires advance approval by the Purchasing Office.
4. All University Bookstore purchases must be made using a P-Card.

B. Purchases of Non-Travel Related of Goods and Services (≥ \$500)¹

1. A Purchase Order (PO), or pre-approved use of the P-Card by the Purchasing Office, is required for all purchases of goods/services costing \$500 or more. POs are initiated through submission of a Purchase Requisition:
 - Purchase Requisition link: http://webserv.jcu.edu/fas/docs/Banner/quick_req_112404.xls
2. Competitive bids may be required for purchases of more expensive items (i.e. goods/services costing over \$1,500 or capital purchases exceeding \$5,000). Please contact the Purchasing Office directly for guidance.

C. Purchasing Card Usage²

1. P-Card credit limits may be adjusted to allow for larger purchases pre-approved by the Purchasing Office.
2. Use of the P-Card, or University's tax exempt status, is prohibited for all personal purchases
3. A list of prohibited P-card purchases can be found on Page 23 of P-Card Policy.
http://webmedia.jcu.edu/businessoffice/files/2015/09/pcard_prohibited_purchases.pdf
4. All University Bookstore purchases must be made using a P-card.
5. Always check to make sure your Ohio in-state purchases are being treated as tax-exempt. You are responsible for contacting in-state vendors who charge the University sales tax
 - Inform vendors of the University's tax exempt status when making purchases. Although the Ohio tax exempt number is printed on the card, P-Card purchases are not automatically exempted.
 - Some vendors will additionally require an Ohio tax exempt form as proof of tax exempt status. This form can be obtained from the Purchasing Office. The Purchasing Office also maintains tax-exempt forms for frequently visited states.

D. Imprinted Items

1. All orders for Imprinted materials (i.e. shirts, etc.) and ad-specialty items (i.e. "give aways") must be pre-approved by the Integrated Marketing Department (i.e. for content) AND the Purchasing Office.
2. Two preferred vendors have been engaged for ad-specialty items and Imprinted wear (No POs are required):
 - **Consolidus** (jcushop.jcu.edu)
Promotional, Ad-specialty (Primary), & Imprint Wear (Limited)
Aubrey Cocklin, *Director of Client Services*
Phone: 330.475.7943 • Email: aubrey.cocklin@consolidus.com
 - **Redbird Promotions**
Imprint Wear (Primarily) & Ad-specialty
Dan Murphy
Phone: 216-233-2665 • Email: dan@redbirdpromotions.com

NOTE: The use of all other vendors requires a PO and pre-approval of the Purchasing Office.

¹John Carroll University Purchasing Policy

²John Carroll University Purchasing Card Policy

³John Carroll University Gift Policy

⁴John Carroll University Budget Advisory: Restrictions Concerning Meal Purchases with University Funds

⁵John Carroll University/Coca-Cola Beverage Agreement

E. Gift Cards

1. Purchases of gifts cards for employees using University funds is not permitted (e.g. holiday gifts, thank you gifts, birthdays, get well gifts, etc.). Any exceptions must be approved in advance by a Divisional Vice President or the Vice President for Finance.
2. Gift cards, of diminutive value, may be permitted as prizes to students for contests, awards, etc. with pre-approval of the Executive Director of Purchasing or Manager of Purchasing/Accounts Payable.

F. University Travel

1. All travel related expenses should be purchased with a P-Card. Any exceptions need to be pre-approved through the Purchasing or Accounts Payable Offices.
 - An exception is commonly granted to air travelers who can demonstrate that using their personal credit/debit card will cause the University to save on checked baggage fees.
2. Cash travel advances are not provided, except for certain international or athletics related travel.
3. Receipts must be obtained for all reimbursable meals, unless permission to use a “per diem” rate has been obtained in advance from the Business Office (e.g. international travel where receipts may not be available).
4. Airline tickets and/or meals for spouses/significant other traveling with an employee may be reasonably charged to the P-Card as a convenience. The intent to use the P-Card in this fashion should be communicated to the Purchasing Office in advance. In such cases, the employee is required to fully document and timely reimburse the University (through the Cashier’s Office) for the portion of the charge attributed to the spouse/significant other.

G. Meetings & Dinners

1. University employees may not use University funds to purchase a meal for themselves alone (except while traveling away from home) . The use of University funds to purchase meals for a group consisting solely of University personnel conducting University business is also not generally permitted, unless the conduct of such business could not be satisfactorily accomplished in any other way.⁴
2. The use of University funds to purchase meals when a University employee is hosting a guest (i.e., speaker, recruit, donor, board member, etc.) of the University may be justified, but should be limited. ⁴
3. Meals should generally not be purchased for outside individuals, such as current or possible future vendors. In each of these cases, justification for the use of University funds rests upon the conduct of official University business and must generally be approved by a third-party (i.e. dean and/or divisional vice president) who is authorized to sign for the budget being charged. ⁴
4. All approved meal related expenses MUST include a description of the “purpose” of the meal, the date of the event, the names of the participants, and an original receipt. ⁴

H. Alcohol & Other Beverages

1. Only Coca-Cola products (including bottled water) may be served, sold, or distributed on campus. Any exception to this policy must be obtained in advance from the Purchasing Office. Individuals may personally bring other brands of non-alcoholic beverages to meetings/events, but may not serve these to others.⁵
2. Alcohol to be served at University on-campus events in the D.J. Lombardo Student Center must be purchased through the University’s Dining Provider in the D.J. Lombardo Student Center (i.e. Aramark Dining Services).
3. Alcohol should be obtained through the through the Purchasing Office and Dining Services (Please call the Catering office at x3007 to arrange at least 10 days in advance to arrange for any alcohol for your events).

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