



## **Mountain Vista United Methodist Church** **Purchasing Procedure**

The church staff has discretionary ability to make budgeted purchases of up to \$100 without prior approval by the Finance Team. Any purchase of goods or services above \$100 and less than \$500 requires approval by the committee that is funding the request. Any purchase over \$500 requires a Purchase Requisition (see page 2). Purchases up to \$1,000 must be approved by the Chair of Finance and does not require a "Bid". The Finance Team must approve purchases over \$1,000, and they require a "Bid". Any purchase that is not budgeted or causes an account to go over budget must be approved by the Administrative Council.

The person or group requesting the goods and services must fill out the Purchasing Requisition. The information that is required is as follows:

1. Definition of the need for the goods or services. (Why)
2. Identification of the goods or services. (What is needed)
3. Requested delivery date.
4. Approximate cost.
5. Assign account number. (If known)
6. Sign the requisition.
7. Secure proper approval from the committee that is funding the request. (See above)

The person authorizing the purchase must:

1. Assume responsibility for the accuracy of the requisition and delivery of goods and/or services.
2. Sign the requisition.
3. Forward to the Chair of Finance.

The Chair of Finance will sign the requisition, which will authorize the Church Administrator to move forward with the purchasing of the goods and/or services. If the purchase requires a "Bid", the Church Administrator will collect the quotes, and then meet with the person authorizing the purchase to discuss the quotes and decide on a vendor.

After the vendor has been selected, the Church Administrator will:

1. Prepare and sign the purchase order, notifying the person who requested the purchase and the Chairman of Finance.
2. Maintain an electronic copy of the purchase order.

When the goods and/or services have been received, the person receiving will:

1. Sign/date the shipping document
2. Forward the shipping document to the Church Administrator to ensure proper payment.
3. The Church Administrator will check the purchase request / receiving document and invoice to ensure proper receipt and proper payment.



**Credit Card Purchases:**

**\*\*Credit cards may only be used for purchases from \$1 to \$100.\*\***

Credit cards are issued for specific needs. They are to be only for the purpose that they were issued, and not for any other committee charges. Credit cards are intended only for discretionary spending (amounts less than \$100). All other spending falls under the purchasing guidelines described above.

**Table of Purchase Guidelines**

<b>PURCHASE AMOUNT</b>	<b>FORM</b>	<b>APPROVAL REQUIRED</b>
\$1 - \$100	N/A	Committee Chair funding the purchase.
\$101 - \$500	Purchase Req. (No Bid required)	Committee Team funding the purchase & signature of Committee Chair person.
\$501 - \$1,000	Purchase Req. (No Bid required)	Committee Team funding the purchase & Signature of Finance Chair & Committee Chair.
\$1,000 +	Purchase Req. (Bid Required)	Committee Team funding the purchase & Finance Team approval and Administrative Council approval.
Any purchase not budgeted.		Administrative Council approval.



## PURCHASE REQUEST

PLEASE PROVIDE THE FOLLOWING INFORMATION:

Date of request: \_\_\_\_\_  
 Define and describe the need for the goods or services:  
 \_\_\_\_\_  
 Approximate cost: \$ \_\_\_\_\_  
\*Bids required for amounts \$1000.00 & over

Preferred Vendor: \_\_\_\_\_  
 Date Required by: \_\_\_\_\_  
 Request submitted by: \_\_\_\_\_  
 Name: \_\_\_\_\_  
 Phone #: \_\_\_\_\_  
 Address: \_\_\_\_\_

Purchase Guidelines:

\$1 - \$100 – Committee Chair Approval  
 \$101 - \$500 – Committee Team Approval, Committee Chair Signature (Purchase Request Required)  
 \$501 - \$1,000 – Committee Team Approval, Committee Chair & Finance Chair Signatures Required with Purchase Request  
 \$1000 & over – Committee Team Approval, Finance Team Approval & Administrative Council Approval (Team, Finance & Administrative Chair's signatures required with Purchase Request)

Any Purchase not budgeted – FIRST must be approved by Administrative Council THEN follow the guidelines above noted.

Required Approval Signatures:

Committee Chair Signature: \_\_\_\_\_ Date: \_\_\_\_\_  
 Finance Chair Signature: \_\_\_\_\_ Date: \_\_\_\_\_  
 Administrative Chair Signature: \_\_\_\_\_ Date: \_\_\_\_\_

## CHECK REQUEST

Date Needed (specify exact date): \_\_\_\_\_ Check represents:  Reimbursement

Payable to: \_\_\_\_\_ Check to be:  Picked up by Requestor  
 Address: \_\_\_\_\_  Regular Mail  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
(Complete Address is required)

Expense/Name Acct: \_\_\_\_\_ Amount: \$ \_\_\_\_\_  
(Required)

Description: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

Requestor Name \_\_\_\_\_ Date: \_\_\_\_\_ phone # \_\_\_\_\_

Required Approval Signatures:  
 Committee Chair Signature: \_\_\_\_\_ Date: \_\_\_\_\_

(ATTACH ALL RECEIPTS)

**MOUNTAIN VISTA OFFICE USE ONLY**

Committee to be charged: \_\_\_\_\_  
 Account to be charged: \_\_\_\_\_