A Roadmap to Making Purchases for Your Student Organization

- After consulting with your IDEA Center Advisor, please coordinate all communication with the IDEA Center through your student organization’s designated fiscal lead: Treasurer/VP Finance and President.
- Drop-in Office Hours for the IDEA Center Coordinator are: Wednesdays and Thursdays from 9:30-10:30am and 2:00-3:00pm
- You may arrange a designated time outside of these hours (if needed) to meet with the IDEA Center Coordinator by sending an email to: idea@eng.ucsd.edu
- Be sure to include a business purpose with all financial requests (university policy). A business purpose should be a brief description of the business nature of what the event/meeting is and why it is necessary for the group/organization. For example: “SWE Board Meeting to discuss student outreach initiatives throughout Fall Quarter 2019 to increase community outreach”.
- Be thoughtful about your organization’s planning process and allow time for processing of orders, artwork development and approvals, as well as turn around and delivery times.

Purchasing Goods: Amazon, AdaFruit, Costco, etc.

1) Search needed items on vendor site
2) Send email to IDEA Center (idea@eng.ucsd.edu) with the Subject: Purchase Request for (Your Org’s Name), identifying your student organization, and providing direct link to item(s) you wish to order, quantity, and any other relevant information to ensure that the correct items are ordered
3) The IDEA Center Coordinator will place the order for you and charge the expenses to your student org’s index
4) You will be notified via email when the items that you ordered arrive
   NOTE: allow enough time for order processing and delivery (minimum of 10 business days)
Purchasing Food: Catered or Delivered Food

Identify the vendor you would like to purchase food from. You may use a UCSD-approved food vendor (contracted with UCSD) OR a vendor that is not contracted with the university.

Non-UCSD Contracted Food Vendors:
If the vendor you would like to order food from is not an approved UCSD vendor, a university credit card can be used, and the amount charged to your student org’s index. Please follow these steps to order food from a non-UCSD vendor:

1) Choose the vendor and place your food order.
   a) If the vendor requires payment when you place the order, meet with the IDEA Center Coordinator to place the order at the IDEA Center so that the Coordinator can make the payment.
   b) If the vendor does not require payment when you place the order, proceed with placing the order, then send a copy of the invoice to the IDEA Center Coordinator so that the Coordinator can make the payment.

2) In either case, provide the IDEA Center Coordinator with the following information via email (idea@eng.ucsd.edu) with the Subject: Food Purchase Request for (Your Org’s Name):
   i) Name of your student group
   ii) Vendor name, phone number and address
   iii) Items to be ordered
   iv) Event name, date and location
   v) Name and phone number of the student who will meet with the delivery staff
   vi) Location for delivery including building and room number
   vii) Business purpose of event
   viii) Number of estimated attendees

3) If all of the information above is not provided, your payment request will not be processed (per university policy).

4) After the event, provide the following information to the IDEA Center Coordinator:
   a) If the event was a meeting, provide a list of attendees, in Excel format. The names (first and last) of all attendees must be provided. Please designate on the list you’re providing if any of the attendees were NOT students.
   b) If the event was not a meeting, simply state “All students in organization (Name of Your Org)”.
   c) Any additional receipts received from the food vendor.

   NOTE: Plan ahead and submit your request at least 7 business days prior to your event date.
**UCSD-Approved Food Vendors:**

If using an approved UCSD vendor, a Purchase Order (P.O.) can be created for you.

1) Check this website for a list of [UCSD-approved food vendors](#).
2) Choose the vendor and place your food order directly with the vendor.
3) Once you've placed the food order, you will receive an invoice from the vendor.
4) Send this invoice via email to the IDEA Center Coordinator (idea@eng.ucsd.edu), as well as the following information, with the Subject: Food Purchase Request for (Your Org’s Name):
   a) Name of your student group
   b) Event name, date and location
   c) Location for delivery including building and room number
   d) Business purpose of event
   e) Number of estimated attendees
5) A Purchase Order (P.O.) will be created for you by the IDEA Center Coordinator, for the items you requested.
6) You will continue to follow-up with the vendor to confirm all order details are accurate.
7) Invoice payment will be made to vendor using your student org’s index, after event completion. The IDEA Center Coordinator will ensure the vendor’s invoice has been paid and closed.
8) After the event, provide any additional receipts received from the food vendor to the IDEA Center Coordinator.

**NOTE:** Once a P.O. is opened it can take **up to 7 business days** to get approved. Please plan accordingly.

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**Purchasing UCSD Parking Permits**

1) You have the option of ordering parking permits per event, or for the whole quarter. Given the time it takes to order parking permits; we strongly suggest that you order for all your events for the quarter. The IDEA Center Coordinator will then hold the permits and check them out to you as needed, for your event.
2) Provide the IDEA Center Coordinator with the following information via email (idea@eng.ucsd.edu) with the Subject: Parking Purchase Request for (Your Org’s Name):
   a) Name of your student group
   b) Type [day (up to 4pm), evening (after 4pm)] and number of parking permits needed
   c) Business purpose of event
   d) Needed delivery date
3) A Purchase Order (P.O.) will be created for you by the IDEA Center Coordinator with UCSD Transportation Services (Parking Office).
4) You will be notified via email when your parking permits arrive.
5) Please return any unused parking permits to your IDEA Center Advisor. 
**NOTE:** Plan ahead and submit your request at least 10 business days prior to your event, or when you would like to have the permits by.

**Purchasing Services/Rentals: Bright Event Rentals**

1) Bright Rentals is the UCSD approved rental company to order event items such as tables, chairs, etc.
2) Connect with your IDEA Center Advisor during your event planning phase to determine needed rental items and budget (if applicable).
3) Place your order directly with Bright Rentals by calling (858) 496-9700
4) Provide the IDEA Center Coordinator with the invoice and the following information via email ([idea@eng.ucsd.edu](mailto:idea@eng.ucsd.edu)) with the Subject: Event Rentals Request for (Your Org’s Name):
   a) Name of your student group
   b) Event name, date and location
   c) Location for delivery including building and room number
   d) Business purpose of event
   e) Number of attendees
5) A Purchase Order (P.O.) will be created for you by the IDEA Center Coordinator, based on the information provided.
6) You will continue to follow-up with your vendor to confirm all order details are accurate.
7) Invoice payment will be made to Bright Rentals using your student org's index, after event completion. The IDEA Center Coordinator will ensure the vendor’s invoice has been paid and closed.
8) After the event, provide any additional receipts received from the food vendor to the IDEA Center Coordinator.

**Purchasing Swag: T-shirts, Bags, Event Giveaways**

1) Identify vendor and items you wish to purchase (determine cost to ensure you are on budget)
2) Have artwork prepared and ready (finalized) for order placement, with quantity and item number(s).
3) Place your order directly with the vendor, providing them with all the necessary artwork, quantity, etc.
4) Provide the IDEA Center Coordinator with the invoice via email ([idea@eng.ucsd.edu](mailto:idea@eng.ucsd.edu)) with the Subject: Swag Purchase Invoice for (Your Org’s Name). The expense will be charged to your student org’s index*
5) You will be notified via email when the items that you ordered arrive
NOTE: Please allow 3-4 weeks for shipping (minimum). RUSH shipping can be extremely expensive!

* If the vendor requires payment with your order, arrange a suitable time with the IDEA Center Coordinator for the payment to be made via online site (at the IDEA Center). Send an email to idea@eng.ucsd.edu with the Subject: Swag Payment Request for (Your Org’s Name)

Purchasing Travel: Student Travel

BEFORE Going on Travel:

1) Coordinate with your IDEA Center Advisor on trip/conference details (business purpose, dates, attendees, etc.) and budget
2) For group travel, please identify a travel lead who can assist other travelers while on travel status with itinerary/reservation questions, any issues that may arise, etc.
3) Connect with the IDEA Center Coordinator (idea@eng.ucsd.edu) with the Subject: Student Travel Request for (Your Org’s Name), to arrange a suitable time to make reservations. Make sure to provide the following information in your email:
   a) Name of your student group
   b) Names of travelers
   c) Travel dates and location
   d) Business purpose of travel
   e) Expected budget
   f) Business Travel Certification Form for each traveler

   NOTE: Please allow a minimum of 4 weeks prior to travel for a pre-authorization to be created for you. A pre-trip authorization must be created for your group prior to any travel arrangements being made.
4) A preauthorization will be created which will pre-approve the trip and allow for funds from your student org’s index to be allocated to this travel.

AFTER Returning from Travel:

1) Provide the IDEA Center Coordinator with all travel documentation via email (idea@eng.ucsd.edu) with the Subject: Student Travel Request for (Your Org’s Name):
   a) Name of your student group
   b) Names of travelers
   c) Travel dates and location
   d) Business purpose of travel
   e) Travel receipts and reservations
   f) Business Travel Certification Form for each traveler

2) All receipts and Business Travel Certification Forms (for each traveler) must be submitted in order to process any payment.
3) For group travel, the designated travel lead will receive and disburse funds to the other travelers after the trip is completed.

   **NOTE:** Once a P.O. is opened it can take up to 7 business days to get approved. Please plan accordingly.