

## PURCHASING TERMINOLOGY

TERMS	DEFINITIONS
<b>Agenda</b>	A document listing the items and/or activities to be discussed or performed in a meeting or event.
<b>Bids</b>	Outreach to multiple vendors to obtain pricing information for goods and/or services. LAGCC requires written bids from 3 vendors if items or services to be purchased exceed \$500.
<b>Catering Form</b>	A form indicating the type of food and beverages to be purchased for an event. A catering form includes information about quantities to be purchased and pertinent event details, such as event date and room location. In lieu of an invoice, LAGCC requires a signed catering form from its in-house caterer, MBJ.
<b>Certificate of Liability Insurance (COI) Form</b>	A one-page form that summarizes the benefits of an insured party's insurance policy. It is proof of insurance coverage including limitations (amounts) of their insurance policy. LAGCC requires COI's from all new food vendors, special service providers (i.e., photo booth companies, game companies, etc.), and movement-oriented companies or performers (i.e., dance instructors, martial artists, etc.). All COIs must name "LAGCC and affiliated entities as additionally insured."
<b>Conference Agenda</b>	A document listing the workshops and/or activities to be held at a conference.
<b>Conference Registration Fees</b>	A sum of money required to register in order to participate at a conference.
<b>Contract</b>	A legally binding written agreement between two or more parties. LAGCC utilizes 2 different contract types to secure services and/or performers for events and activities on or off-campus. LAGCC requires original signatures on all contracts (e-signatures and faxes are not valid and will not be processed).
<b>CUNY Off-Campus Student Travel Approval Form</b>	A form that must be completed by the Trip Sponsor (Campus Life or other designated funding source Representative) and submitted to the Chief Student Affairs Officer for student organization travel or to the Chief Academic Officer for academic (class) related travel a minimum of one month prior to travel. All organized travel is expected to follow the <b>CUNY Student Domestic Trip and Travel Guidelines</b> . These Guidelines can be found at <a href="http://www.cuny.edu/academics/programs/international/faculty.html">http://www.cuny.edu/academics/programs/international/faculty.html</a> . This form must be approved by the Chief Student Affairs Officer or the Chief Academic Officer in order for travel to commence.
<b>CUNY Off-Campus Travel Waiver</b>	This form must be completed and signed by all students participating in off-campus travel. If students are under 18 years of age, their parents or guardians must also complete this form and have it notarized. LAGCC requires off-campus travel waivers to be completed by students participating in out-of-state or international travel only.
<b>Design Specifications</b>	A detailed document providing information about a designed product (or process). Design specifications typically include image(s), drawings, dimensions, and colors. LAGCC requires design specifications for promotional items.
<b>Event Flyer</b>	A document advertising an event or product. LAGCC requires event flyers for all purchases, including private events.
<b>Event Sign-In Sheet</b>	List of event attendees, it includes participants' full names and EMPL ID information. LAGCC requires event sign-in sheets for all college-sponsored activities on and off-campus.
<b>Funding Request Form</b>	Form utilized to request funding for events and activities on and off-campus. The funding request form requires thorough details about how organizations plan to utilize the funds requested. All funding request forms must be submitted with supporting documents to the appropriate funding source in order to be considered for funding approval.
<b>Independent Contractor Agreement</b>	An LAGCC contract type used for a vendor who will perform a service for the college. For instance, a smoothie company, a photo booth company, or a person who will be setting up and operating lighting for a show, and so on.
<b>Invoice</b>	A document issued by a vendor to the buyer indicating the quantities and costs of the products and/or services provided by the vendor. An invoice specifies what a buyer must pay the vendor according to the vendor's payment terms.
<b>Performance Agreement</b>	An LAGCC contract type used for a vendor who will perform at an event, such as, a DJ, a band, musician, dancer, or singer. A person who has an agent representing them would also fall under this category. LAGCC also uses this type of contract to pay event speakers and/or panelists.
<b>Pre-Attendance Sheet</b>	Similar to an event sign-in sheet, the pre-attendance sheet requires participants' full names and EMPL ID information. LAGCC requires finalized pre-attendance sheets for all off-campus activities.
<b>Promotional Items (LAGCC Branded Products)</b>	Articles of merchandise that are branded with a logo and are typically used as a marketing strategy to attract attention to an entity and/or organization. LAGCC promotional items adhere to a very specific product type list and design guidelines, please refer to the <b>LaGuardia Community College 2018 Branded Promotional Products Catalog</b> for additional details.
<b>Quote</b>	A verbal notice or document that provides the estimated cost for a product(s) or service(s). LAGCC requires written quotes from all vendors, 3 written quotes are always needed when an item or service exceeds \$500.
<b>Scope of Work</b>	The section of a contract agreement in which the work to be performed is described in detail. All contracts require a scope of work section.
<b>Shopping Cart</b>	Similar to an invoice, a shopping cart is the online version of the invoice. It indicates the types of products to be purchased, the quantities, and their costs, including shipping costs.
<b>Tax Exempt Form</b>	A certificate form that enables a purchaser to make tax-free purchases that would normally be subject to sales tax. LAGCC is a tax exempt institution, as such, it does not pay in state taxes.
<b>Vendor</b>	A person or business that supplies goods or services to an entity or individual.
<b>Vendor Bio</b>	A document that provides a detailed description of an entity or individual's professional experience. LAGCC requires vendor bios for new entities or individuals providing goods and/or services to the college. Vendor bios can easily be obtained from entities' "About" pages online or by asking individuals to provide copies of their resumes.
<b>W-9 Form</b>	A commonly used IRS form, the "Request for Taxpayer Identification Number and Certification" form is used by Individuals and entities to provide their taxpayer identification number (or social security number) to entities that will pay them income during the tax year. LAGCC requires this form from all new vendors. LAGCC requires original signatures on all W-9 forms.

## PURCHASE ORDERS - CHECK LISTS

Supporting documents required to get purchase orders approved and processed

CL= Campus Life

\*\*= Campus Life Designee Responsible for Item

RST= Required Submission Timeline

FOOD	DECORATIONS	SUPPLIES	BUS SERVICE
Agenda Event Flyer Quote(s)  3 Bids (if expense exceeds \$500)  W-9 Form with Original Signature (if new vendor)  COI (if new vendor)  Event Sign-In Sheet (to be submitted to CL post event)  <b>RST= 1 week prior to event</b>	Agenda Event Flyer Shopping Cart(s)  3 Bids (if expense exceeds \$500)  W-9 Form with Original Signature (if new vendor)  Event Sign-In Sheet (to be submitted to CL post event)  <b>RST= 2 weeks prior to event</b>	Agenda Event Flyer Shopping Cart(s)  3 Bids (if expense exceeds \$500)  W-9 Form with Original Signature (if new vendor)  Event Sign-In Sheet (to be submitted to CL post event)  <b>RST= 2 weeks prior to event</b>	Agenda Event Flyer Quote(s)  3 Bids (if expense exceeds \$500)  W-9 Form with Original Signature (if new vendor)  COI (from selected/lowest priced vendor only)  Finalized Pre-Attendance Sheet  CUNY Off-Campus Travel Waivers (if traveling out of state only)  <b>**CUNY Off-Campus Student Travel Approval Form</b>  Event Sign-In Sheet (to be submitted to CL post event)  <b>RST= 4 weeks (30 days) prior to event</b>
DJ & OTHER PERFORMERS	SPEAKERS & PANELISTS	SPECIAL SERVICE PROVIDERS (I.E, PHOTO BOOTH, LIGHTING COMPANY, GAMES COMPANY, OTHERS)	CONFERENCE
Agenda  Event Flyer  Quote(s)  3 Bids (if expense exceeds \$500)  W-9 Form with Original Signature (if new vendor)  <b>**Performance Agreement with Original signature</b>  <b>**Scope of Work</b>  Vendor Bio (or resume)  COI (from movement-oriented performers only)  Event Sign-In Sheet (to be submitted to CL post event)  <b>RST= 4 weeks (30 days) prior to event</b>	Agenda  Event Flyer  Quote(s)  3 Bids (if expense exceeds \$500)  W-9 Form with Original Signature (if new vendor)  <b>**Performance Agreement with Original signature</b>  <b>**Scope of Work</b>  Vendor Bio (or resume)  Event Sign-In Sheet (to be submitted to CL post event)  <b>RST= 4 weeks (30 days) prior to event</b>	Agenda  Event Flyer  Quote(s)  3 Bids (if expense exceeds \$500)  W-9 Form with Original Signature (if new vendor)  <b>**Independent Contractor Agreement with Original Signature</b>  <b>**Scope of Work</b>  Vendor Bio (or resume)  COI (from selected service provider)  Event Sign-In Sheet (to be submitted to CL post event)  <b>RST= 4 weeks (30 days) prior to event</b>	Agenda (itinerary for entire trip)  Event Flyer  Conference Agenda  Conference Registration Fees (if applicable)  Venue Information (official from vendor's website)  Hotel Shopping Cart(s) or Quote(s) (If applicable)  Hotel Bids (If applicable)  Transportation Shopping Cart(s) or Bus Quote(s) (If applicable)  COI (from selected/lowest priced bus vendor only, If applicable)  Food Shopping Carts (if applicable)  Finalized Pre-Attendance Sheet  CUNY Off-Campus Travel Waivers (if traveling out of state only)  <b>**CUNY Off-Campus Student Travel Approval Form</b>  Event Sign-In Sheet (to be submitted to CL post event)  <b>RST= 4 weeks (30 days) prior to event</b>
MUSEUM OR OTHER TICKETED ACTIVITY	PROMOTIONAL ITEMS		
Agenda  Event Flyer  Shopping Cart(s)  Venue Information (official from vendor's website)  3 Bids (if expense exceeds \$500 or cost justification memo if selected show/event cannot be put out to bid)  W-9 Form (if new vendor)  Finalized Pre-Attendance Sheet  CUNY Off-Campus Travel Waivers (if traveling out of state only)  <b>**CUNY Off-Campus Student Travel Approval Form</b>  Event Sign-In Sheet (to be submitted to CL post event)  <b>RST= 4 weeks (30 days) prior to event</b>	Agenda  Event Flyer  Quote(s) or Shopping Cart(s)  3 Bids (if expense exceeds \$500)  W-9 Form (if new vendor)  Design Specifications  Event Sign-In Sheet (to be submitted to CL post event)  <b>RST= 6-8 weeks prior to event</b>		

\*\*\*CL Recommends Clubs & Organizations Consult with CL Designees 1-2 Weeks Prior to Submitting Proposals

\*\*\*All New Vendors Must Submit W-9 Forms with Original Signatures (exceptions apply to museums, ticketed shows, and some online vendors only)

\*\*\*Food Purchases Must Adhere to CUNY's Meal Allowances Guidelines:  
Breakfast= \$3.50 Max Per Person / Lunch= \$8.00 Max Per Person

\*\*CL Designee(s): contact Dannery Minaya for Civic Engagement, Leadership and Professional Development, Social & Academic programming