

## **Institute for Leadership Advancement - LEP Budget Spending Procedures**

**Once your group has submitted your project and it has been approved, you need to set up an appointment with Administrative Assistant, Brittany Eberts to review funding, spending of funds, forms, travel, etc.**

### **Here are a few helpful tips:**

- Before spending any of the funds you are given as a group, you need to submit a Budget Proposal and if traveling a LEP Travel Request Form to Kevin Smith, and that proposal needs to have been approved
- All **itemized receipts** need to be turned in to Brittany Eberts in CBA 421
- There are different ways to spend your funds: travel, hiring an outside vendor, rentals, food, promotional items, etc.

### **How to purchase promotional items:**

- See “How do I...Buy Promotional Items” sheet listed on Institute website
- A Budget Proposal is still needed. Once you have found the items you would like to purchase, submit your budget proposal. Once that is approved, you can proceed to purchase items. See Brittany for further details on using University purchasing card.

### **How to hire an outside vendor:**

We prefer to use approved vendors if they are available for the services needed.

- First check Campus Contracts list (form found on Institute website), to see if there is a vendor already approved by the University. If so, it will eliminate paperwork.
- If vendor is listed on form, you can contact vendor to receive an estimate for services. Make sure to include estimate on your budget proposal. After your budget proposal is approved, you may secure your vendor. After services are complete, your group must turn in an invoice to Brittany Eberts (room 421) so vendor can then be paid.
- If vendor is NOT listed on form, you must have your vendor fill out a Service Agreement form. Please contact Brittany at 330.972-8115, or stop up to office CBA 421 to talk to her about the forms.

Questions? Brittany can be reached at:

Phone – 330-972-8115

Email – [beberts@uakron.edu](mailto:beberts@uakron.edu)

In person – CBA 421