

<b>CHRIST'S CHURCH</b> OF THE VALLEY	Management System – Operating Procedure	
	OP7003 Purchasing	Revision: A
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## Approval

Originator	Reviewer	Approver
Janet Flitter	Terri Stone	Kevin Stone

## Revision History

Rev.	Date	Originator	Summary of Changes
A	12/10/07	Janet Flitter	Initial Release

### 1. Purpose

The purpose of this operating procedure is to establish, document, and communicate the process for purchasing at Christ's Church of the Valley (CCV).

### 2. Scope

The purchasing process should be used by paid staff and/or ministry area volunteers for purchases required during the course of conducting ministry activities at CCV. Purchases include but are not limited to supplies, equipment, books, subscriptions, and any other purchase not normally done via expense reimbursement, check request, or petty cash processes. The process begins with the completion of a purchase requisition form and concludes with the receipt of purchased goods.

### 3. Responsibility

As with all procedures and other documentation contained in the Management System, it is the responsibility of all department leaders to ensure the details of this process are known and followed by all CCV paid staff and ministry area volunteers. The primary responsibility for this process rests with the Finance Manager.

### 4. Definitions

**Account Number** – The combination of a department number and expense account number (including sub-account number if applicable) separated by a dash. For example, 3011-018 collectively is the complete “account number.”

**Business Week** – A business week is defined as the 5 weekdays of the week (Monday, Tuesday, Wednesday, Thursday, and Friday).

**Chart of Accounts** – A document (OP7003-F001) listing all CCV department numbers and expense account numbers which is located in the Management System document library on the CCV Intranet.

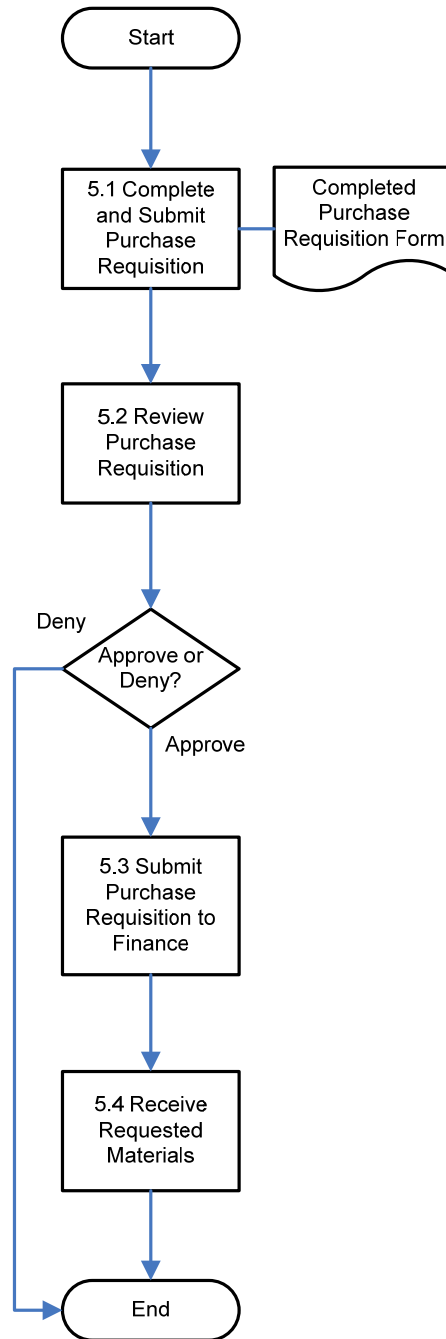
**Department Leader** – A department leader is the senior leader with responsibility for a defined CCV department. For example, the Director of Adult Ministries is a department leader.

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## 5. Procedure



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## **5.1 Complete and submit purchase requisition.**

- 5.1.1 To make a purchase the requester should complete a purchase requisition form (OP7003-F001). The form can be obtained via the Management System section of the CCV Intranet under the “Execution” section in the “Forms” folder.
- 5.1.2 All purchase requisitions should be completed electronically (in Excel) to ensure accuracy and legibility. Handwritten purchase requisitions will not be accepted.
- 5.1.3 The purchase requisition should be filled out completely by the requester including the requester’s name, department, recommended supplier (if known), account number (obtained via the Chart of Accounts – OP7003-F002), need date, item number (if applicable), description, quantity, and unit price.
- 5.1.4 The requester should include any notes and special instructions that will assist the Finance Manager in making the requested purchase(s). If needed the reason for the request should also be included in the notes and special instructions section of the form.
- 5.1.5 Once the purchase requisition is completed it should be printed and submitted to the requester’s department leader for approval.
- 5.1.6 If the requester is a department leader the completed purchase requisition should be submitted directly to the Executive Pastor for approval.

## **5.2 Review purchase requisition.**

- 5.2.1 Every purchase requisition requires the review and approval of a department leader.
- 5.2.2 The department leader should ensure the purchase requisition is completed correctly and that all requested purchases are appropriate and reasonable within established guidelines and departmental expense budgets.
- 5.2.3 Once the department leader reviews the purchase requisition, their approval should be indicated by signature and date on the department leader line at the bottom of the purchase requisition.
- 5.2.4 The department leader should then forward the purchase requisition to the Executive Pastor for review and approval.
- 5.2.5 The Executive Pastor will review the purchase requisition and indicate approval by signing and dating the purchase requisition on the Executive Pastor line.
- 5.2.6 If the purchase requisition is denied, it will be returned to the requester along with an explanation of why it was denied. The requester should resolve the issue and resubmit the purchase requisition if desired.

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### 5.3 Submit purchase requisition to finance.

- 5.3.1 Once the purchase requisition is signed by both the department leader and Executive Pastor, the purchase requisition should be submitted to the Finance Department for purchasing.
- 5.3.2 The Finance Department will review the purchase requisition to ensure it is properly completed, including all necessary information as well as the proper approvals.
- 5.3.3 If a purchase requisition is found to be improperly completed or does not include all necessary information, it will be returned to the requester for resolution.
- 5.3.4 After verification of the purchase requisition, the order will be placed based on date needed and availability of funds.
- 5.3.5 Once the purchase has been completed, the Finance Manager will notify the requester that the purchase has been made and the approximate due date for the goods purchased.
- 5.3.6 In some cases, the Finance Manager may return the completed, signed purchase requisition to the requester to allow them to make the purchase. In this case, the requester should notify the Finance Manager when the purchase is completed, including the approximate due date for the goods purchased.

### 5.4 Receive requested materials.

- 5.4.1 When the Finance Department has received the goods purchased, they are delivered to the requester or other individual as deemed appropriate and/or indicated in the notes and special instructions section of the purchase requisition.
- 5.4.2 The requester is responsible for letting the Finance Department know if there is a problem with the order and if any action needs to be taken.

## 6. Related Documents

- 6.1 **OP7003-F001 Purchase Requisition Form**
- 6.2 **OP7003-F002 CCV Chart of Accounts**

## 7. Records

Record Identification	Record Owner	Location	Record Media	Retention/ Disposition
Purchase Requisition Form	Finance Department	Finance Department File Cabinet	Hardcopy	5 Years/Shred

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## 8. Process Effectiveness Metrics

Metric	Tool/Analysis Method(s)	Reporting	Frequency
CCV Performance to Budget	CCV Annual Budget	KPM	Monthly
Departmental Performance to Budget	Departmental Budgets	QuickBooks Budget Reports	Monthly

## 9. Miscellaneous

None identified.

## 10. Attachments

None identified.

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