

# **Lincoln University**

## **TITLE III**

### **Policy Manual**

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# **POLICIES**



## **Goals and Objectives**

In the Title III proposal and continuation reports that have been submitted to the U.S. Department of Education are goals and objectives for each Activity and a projected time line for their completion. An interim report is filed each year with the U.S. Department of Education as part of the continuation grant process, which reviews progress in the Activity up to the date of the report. In order to accurately report on the progress made on the Activity it is necessary to collect information in a uniform manner. The Title III Quarterly Information Report was developed to collect this information. Completion of this form will be required by the Activity/Program Directors each quarter of the fiscal year: December 31, March 30, June 30 and September 30, and returned to the Title III Program Coordinator.

The Title III Quarterly Information Report should be completed to better judge the progress of the program. If any major activities occur or if changes in the program are required this form should be used to make such requests. If there are any questions regarding the preparation of the form, contact the Title III Program Coordinator immediately.

Information regarding the expenditures can be gathered from the Title III Program Coordinator. Expenditures of the Title III budget have to be approved through the Activity Director and then the Title III Program Coordinator.

## **Purchasing and Travel**

It is the responsibility of the Activity Director to initiate the request for purchases and travel through the use of Lincoln University forms. Prior to the submission of the forms the Title III Program Coordinator will be consulted to insure that the items of the travel request fall within the guidelines of the Activity. Periodically the Title III Program Coordinator will confer with the Office of Special Programs to make sure that items charged to the program have been properly recorded. The Title III Program Coordinator will also make sure that any adjustments to Title III accounts are documented in the Lincoln University ledger. The goal is to insure, both before and after they are made, that all purchases by Lincoln University, which are intended to be within the Title III program, are correct and accurate.

Lincoln University Travel Authorization Request, Purchase Requisition, and Voucher forms will continue to be used. (900 series only) **Identify Title III and Title III code;** this will insure that all purchases that conform to the standards and intent of the program will be charged to Title III.

Special Program Vouchers are required for all check requests, reimbursements and advances. The vouchers should be filled out in duplicate and attached to a Special Programs Purchase Requisition along with other required documentation (receipts, invoices, etc.).

## **Unallowable Expenses**

1. Activities that simply are not in your approved application.
2. Activities inconsistent with any State plan for higher education applicable to your college.
3. Activities or services that relate to sectarian instruction or religious worship or provided by a school or department of divinity.
4. Developing or improving non-degree or non-credit courses OTHER THAN BASIC SKILLS DEVELOPMENT COURSES.
5. Developing or improving community-based or community services programs, unless the program provides academic-related experiences or academic credit toward a degree for degree students, or, unless your college is a Hispanic-serving institution or Tribal college and it is a program or services to encourage elementary and secondary school students to develop the academic skills and the interest to pursue postsecondary education.
6. Purchase of STANDARD OFFICE EQUIPMENT, such as furniture, file cabinets, bookcases, typewriters, or word processors.
7. Payment of any portion of the salary of a president, vice president or equivalent officer who has college-wide administrative authority and responsibility to fill a position under the grant such as project coordinator or activity director.
8. Costs of organized fund-raising, including financial campaigns, endowment drives, solicitation of gifts and bequests, and similar expenses incurred SOLELY TO RAISE CAPITAL OR OBTAIN CONTRIBUTIONS.
9. Costs of student recruitment such as advertisements, literature and college fairs.
10. Services to high school students unless your college is a Hispanic-serving institution or Tribal college and they are services to encourage students to develop the skills and the interest to pursue postsecondary education.
11. Instruction in the institution's STANDARD courses as indicated in the institution's catalog.
12. Costs for health and fitness programs, transportation, and day care services.
13. Student activities such as entertainment, cultural, or social enrichment programs, publications, social clubs or associations.
14. Activities that are OPERATIONAL in nature rather than DEVELOPMENTAL in nature.
15. Indirect costs.
16. Supplanting, with grant funds, funds that would otherwise be available for the activities to be carried out under the grant.

**Office of Management and Budget's Circular A-21 Cost Principles for Educational Institutions**

General provisions for selected items of cost

1. Advertising and public relations costs
2. Alcoholic beverages
3. Alumni/ae activities
4. Bad debts
5. Civil defense costs
6. Commencement and convocation costs
7. Communication costs
8. Compensation for personal services
9. Contingency provisions
10. Deans of faculty and graduate schools
11. Defense and prosecution of criminal and civil proceedings, claims, appeals and patent infringement
12. Depreciation and use allowances
13. Donations and contributions
14. Employee morale, health, and welfare costs and credits
15. Entertainment costs
16. Equipment and other capital expenditures
17. Executive lobbying costs
18. Fines and penalties
19. Goods or services for personal use
20. Housing and personal living expenses
21. Insurance and indemnification
22. Interest, fund raising, and investment management costs
23. Labor relations costs
24. Lobbying
25. Losses on other sponsored agreements or contracts
26. Maintenance and repair costs
27. Material costs
28. Memberships, subscriptions and professional activity costs
29. Patent costs
30. Plant security costs
31. Preagreement costs
32. Professional services costs
33. Profits and losses on disposition of plant equipment or other capital assets
34. Proposal costs
35. Rearrangement and alteration costs
36. Reconversion costs
37. Recruiting costs
38. Rental cost of buildings and equipment
39. Royalties and other costs for use of patents
40. Sabbatical leave costs

41. Scholarships and student aid costs
42. Selling and marketing
43. Severance pay
44. Specialized service facilities
45. Student activity costs
46. Taxes
47. Transportation costs
48. Travel costs
49. Termination costs applicable to sponsored agreements
50. Trustees

### **Travel Authorization Requests**

Only those employees who have followed University policy and procedures for travel by completing the Travel Authorization Form will be permitted to travel at the expense of the Title III. **Title III will not pay for any unapproved travel, nor travel not approved prior to the trip.** In addition, employees will only be reimbursed if travel resulted in expenses that would not otherwise be incurred during a normal workday.

**All travel needs and costs (car rental, hotel, airline, registration fee) must be listed on the Travel Authorization Request. Any check request pertaining to the Travel Authorization Request must be submitted with the Travel Authorization Form.**

All requests for Foreign Travel must also be approved by Title III in Washington.

### **Purchase Requisitions**

**Due to the number of verifications that need to be made to Title III Requisitions (i.e. allowability, available funds, etc.) requisitions can NOT be walked through.**

The originating department determines the need and completes the purchase requisition. All Title III requisitions must start with "9". **All requisition requests except for routine requests (office supplies) must be submitted with a Title III Requisition Justification Form.** This form can be found in the Appendix.

The information required on the requisition is:

1. Check appropriate box at the top to indicate a Purchase Requisition.
2. Fill in the full name, address, telephone and fax number of the suggested vendor
3. The department that is requesting the product or service
  - Department name must include:
    - a. Title III
    - b. Activity #
    - c. Department originating request (i.e. Counseling and Career Services)

- Sample Department line:  
Title III, Activity I Honors Program  
Title III, Activity II Counseling and Career Services
  - If Information Technology is originating the requisition the department information listed above must be on the form followed by (IT).  
Ex: Title III, Activity II Counseling and Career Services (IT)
4. Date required – DO NOT USE ASAP, normal processing time is about two weeks
  5. Department account code (example: 92-1290)
  6. Object Code (example: A02.70140.000 for supplies)  
**(Note: if you are uncertain which budgetary code to use contact the Special Programs Office on extensions 1048 and 3413)**
  7. Quantity, description of product or service, unit price, amount
  8. Total requisition amount. Make sure the unit prices are added correctly across and down.
  9. Requisitions require the following signatures:
    - Chief Information Systems Technology Officer (if purchase involves technology equipment)
    - Vice President's or Dean's signature
    - Activity Director (if same as Vice President's, VP signature not required)
    - Title III Program Coordinator (after Activity Director has signed)
    - Special Programs Director (after Title III Program Coordinator has signed)

After obtaining the signature of the Activity Director the requisition should be forwarded to the Title III Program Coordinator for approval.

If the following conditions are met, the form will be signed by the Title III Program Coordinator and forwarded to the Special Programs Director:

1. The request is allowable under Title III guidelines.
2. The form is filled in **completely and correctly**
3. There is money available in the account

If any of the three conditions listed above are not met, the form will be returned to the originator with a memo explaining why it is being returned. (See Appendix)

### **Check Requests**

**Due to the number of verifications that need to be made to Title III Requisitions (allowability, available funds, etc.) check requests can NOT be walked through.**

The originating department determines the need and completes the check request. All Title III check requests must start with "9". All requests except for routine requests (office supplies) must be submitted with a Title III Requisition Justification Form. This

form can be found in the Appendix. Special Programs Voucher (2) must be submitted with all check requests.

The information required on the request is:

1. Check appropriate box at the top to indicate a Check Request.
2. Fill in the full name, address, telephone and fax number of the suggested vendor
3. The department that is requesting check
  - Department name must include:
    - a. Title III
    - b. Activity #
    - c. Department originating request (i.e. Counseling and Career Services)
      - Sample Department line:  
Title III, Activity I Honors Program  
Title III, Activity II Counseling and Career Services
  - If Information Technology is originating the request the department information listed above must be on the form followed by (IT).  
Ex: Title III, Activity II Counseling and Career Services (IT)
4. Date required – DO NOT USE ASAP, normal processing time is about two weeks
5. Department account code (example: 92-1290)
6. Object Code (example: A02.70140.000 for supplies)  
**(Note: if you are uncertain which budgetary code to use contact the Special Programs Office on extensions 1048 and 3413)**
7. Quantity, description of product or service, unit price, amount
8. Total requisition amount. Make sure the unit prices are added correctly across and down.
9. Requests require the following signatures:
  - Chief Information Systems Technology Officer (if purchase involves technology equipment)
  - Vice President's or Dean's signature
  - Activity Director (if same as Vice President's, VP signature not required)
  - Title III Program Coordinator (after Activity Director has signed)
  - Special Programs Director (after Title III Program Coordinator has signed)
  - Vice President of Fiscal Affairs

After obtaining the signature of the Activity Director the check request should be forwarded to the Title III Program Coordinator for approval.

If the following conditions are met, the form will be signed by the Title III Program Coordinator and forwarded to the Special Programs Director:

1. The request is allowable under Title III.
2. The form is filled in **completely** and **correctly**.
3. There is money available in the account.

If any of the three conditions listed above are not met, the form will be returned to the originator with a memo explaining why it is being returned. (See Appendix)

## **Invoices**

Invoices when received by Accounts Payable will be faxed from Special Programs. Verify with Receiving that all items have been received (visually inspect your order or verbally verify). If you have concerns, notify Special Programs immediately. If there are NO problems, sign and date the invoice and note "OK to pay". Submit invoice to Special Programs for processing. Special Program vouchers will no longer be required for this step. No invoice should be held longer than 3 to 5 days; failure to comply will result in processing delays of future requests.

## **Special Program Voucher**

Special Program Vouchers are no longer required to process invoices containing a purchase order number. Special Program Vouchers must be submitted for all other Title III expenses (reimbursements, check requests, travel advances).

- Your Account Number and the name of your program must appear at the top of your program voucher.
- This Special Program Voucher must always be submitted in DUPLICATE.
- Vouchers must accompany any requisition that is to be PREPAID. All back up for payment must be attached.
- Vouchers must also accompany any "Personal Services" forms, which are also to be submitted in DUPLICATE.
- Vouchers must accompany any Travel Expense Reimbursements to be processed (along with a requisition).

### **Computer/Equipment Locator Tags**

All equipment and computer hardware must be tagged with Title III Locator Tags. The department ordering the equipment will be sent the tags along with a Title III Computer/Equipment Locator Form. The tag must be placed on the equipment as soon as the item is received. The form must be completed in its entirety, signed, dated and returned to the Title III office within one week of receiving the equipment.

### **Time and Effort**

The following methods will be used to ascertain the level of time and effort given to the program:

#### **Secretarial/Clerical**

This category of employee is tracked by the use of a time clock. The Office of Human Resources maintains records of these employees. Those records are available to the Title III Program Coordinator upon request.

#### **Administrative**

The Office of Human Resources has implemented a Daily Time Sheet for the administrative staff. These monthly forms are submitted to the appropriate Vice President of the unit (who also serves as the Activity Director) for approval and then submitted to the Office of Human Resources. These records track the time and effort for this category of employee. For those administrators who have a fraction of their salary apportioned to activities, which are not in line with the goals and objectives of the program, the unit Vice President will monitor commitment to the Title III program using the Time and Effort Information for Employees with Multiple Appointments form. This form is submitted with the Quarterly Report to the Title III Program Coordinator.

#### **Faculty**

The amount of time faculty are required to commit to Lincoln University is defined within the Collective Bargaining Agreement. The Office of Academic Affairs in conjunction with the department chair is responsible for insuring the attendance and work of faculty.

**All Title III personnel are required to submit the following reports:**

- **Twelve Time and Effort Monthly Reports AND twelve Time and Effort Monthly Detail Reports.** One of each need to be submitted for each month. These are due to the Title III Program Coordinator on the 15<sup>th</sup> of the following month. For example the April Monthly Report Sheets would be due on May 15<sup>th</sup>. These forms can be found in the Appendix.
- **Four Quarterly Reports.** One must be submitted for each quarter (October-December, January-March, April-June and July-September). These reports are due to the Title III Program Coordinator on the 15<sup>th</sup> of the month following the quarter. For example the October-December Quarterly Report Memo would be due January 15<sup>th</sup>. A sample of this form can be found in the Appendix.
- **Two Fulfillment of Contract Reports.** One needs to be submitted for October – June (due July 15) and one needs to be submitted for July- September (due October 15).

**FAILURE TO SUBMIT ALL REPORTS MAY RESULT IN THE JULY AND/OR OCTOBER PAYCHECK BEING HELD.**

**Fulfillment of Contract**

Each administrator and faculty member on Special Programs must complete and sign a “Fulfillment of Contract” memorandum to be submitted to the Title III Program Coordinator (see Appendix). This memorandum summarizes work performed through the end of the University’s Fiscal year (June 30<sup>th</sup>) and through the end of the program’s funding year (September 30). This report is a summary and is based on reports requested by the Title III Program Coordinator during the year of your contract. Hours of effort are not necessary, however, percentages of time are required. This report MUST be signed and include a signature line for the Title III Program Coordinator’s approval.

**Certification of Fulfillment**

The “Fulfillment of Contract” memorandum will be signed by the Title III Program Coordinator and submitted with a “Certification of Fulfillment” memorandum certifying level of time and effort reporting (see Appendix) to the Special Programs Director. The Title III Program Coordinator’s Time and Effort Fulfillment of Contract memorandum MUST be submitted to either the Vice President or Dean of the Title III program, who will certify his time and effort.

## **Time Frame**

### **Administrators**

Level of Time and Effort Certification for administrative employees on Special Programs are due 30 days after the end of the fiscal year ending June 30<sup>th</sup>. Reports are due July 31<sup>st</sup>. If the 31<sup>st</sup> falls on a weekend, reports are due the last working day, prior to receiving paycheck.

### **Faculty**

Level of Time and Effort Certification for academic year faculty on Special Programs are due on May 31<sup>st</sup>. If the 31<sup>st</sup> falls on a weekend, reports are due on the last working day prior to receiving paycheck.

Level of Time and Effort Certifications for faculty are due 30 days following the end of the program funding year of September 30<sup>th</sup> (July 1<sup>st</sup> through September 30<sup>th</sup>). Reports are due October 31<sup>st</sup>. If the 31<sup>st</sup> falls on a weekend, reports are due on the last working day prior to receiving paycheck.

## **Lincoln University Business Travel Expenses General Guidelines**

All business travel requests must be submitted on a Travel Authorization Form and be approved in advance by the appropriate Dean or Vice President, or in the event of overseas travel, by the President.

Only those employees who have followed University policy and procedures for travel by completing the Travel Authorization Form will be permitted to travel on University business at the expense of the University. **The University will not pay for any unapproved travel, nor travel not approved prior to the trip.** In addition, employees will only be reimbursed if travel resulted in expenses that would not otherwise be incurred during a normal workday.

Employees who are involved in an accident while traveling on business must promptly report the incident to their immediate supervisor. Vehicles owned, leased, or rented by Lincoln may not be used for personal use without prior approval.

With prior approval, a family member or friend may accompany employees on business travel, when the presence of a companion will not interfere with successful completion of business objectives. Generally, employees are also permitted to combine personal travel with business travel, as long as time away from work is approved. Additional expenses arising from such nonbusiness travel are the responsibility of the employee.

When travel is completed, employees should submit completed travel expense reports within 30 days. Receipts for all expenses greater than \$4.00 should accompany reports and be attached to an 8-1/2" x 11" sheet of paper, if smaller.

Employees should contact their supervisor for guidance and assistance on procedures related to travel arrangements, expense reports, reimbursement for specific expenses, or any other business travel issues.

Abuse of this business travel expenses policy, including falsifying expense reports to reflect costs not incurred by the employee, can be grounds for disciplinary action, up to and including termination of employment.

### **Travel Procedures for Air, Amtrak, Hotel, and Car Reservations**

The University will only pay for transportation costs associated with travel booked through International Tours, a Lincoln University approved travel agency, or through an online agency (the employee must pay for travel reservations in advance using their own credit card). If travel is reserved through International Tours, a Travel Profile must be on file in the Office of Human Resources and at International Tours for all individuals traveling on University business.

Once the required Travel Authorization Form has been submitted and proper approval has been attained, it will be up to the employee or referring department to make the travel reservations. Approval for all reservations for one trip should be requested at the same

time. For example, for an overnight stay, the airline, hotel and car rental (if necessary) information should be requested simultaneously on one Travel Authorization Form for the dean's, vice president's, or president's approval.

It is the policy of Lincoln University to secure the least expensive airfares and will therefore search all airlines, including Southwest Airlines. The University will not pay for first class or business class fares. Whenever available, an electronic ticket should be obtained instead of a paper ticket. All other travel related expenses, i.e., car rental, hotel, meals, etc., will be reimbursed through the Travel Expense Statement. Employees are expected to limit expenses to reasonable standards.

### **Advance Payment of Travel Expense**

When a registration or similar fee requires payment in advance of the travel date, the date required should be indicated on the Pre-travel Authorization Form with appropriate documentation attached. The University will then remit payment directly to the applicable organization.

### **Travel Advances**

If the estimated cost of an approved trip exceeds \$200, the Business Office will provide the employee an advance of up to 50 percent of the estimated cost. The requested advance must be submitted on an approved Travel Authorization Form received by the Business Office no later than 10 days prior to the date the check is needed. Travel advances will not be released more than five days before the travel is to begin.

### **Entertainment Expenses**

Expenses generated for the purpose of entertaining (lunch, dinner etc.) Vendors, visiting lecturers and other non-employee constituents of the University for the purpose of conducting business is permitted and will be reimbursed for all reasonable expenses. Entertainment expenses should be submitted within 30 days of occurrence and should be submitted along with receipts on the appropriate forms.

### **Mileage Reimbursement**

The University will use the going IRS rate plus actual expenses for tolls and parking fees (with receipts). Mileage is calculated as originating from Lincoln University's main campus or urban center, depending on your primary location of employment. If your destination is not listed on the back of the Travel Expense Statement, please provide a copy of your destination on Mapquest.

Please note that mileage will only be reimbursed if travel resulted in expenses that would not otherwise be incurred during a normal workday. For example, a Lincoln University employee lives adjacent to the Urban Center but his/her primary worksite is located at the Main Campus. The employee must make a university-related visit to the Urban Center on his/her way home. The employee does not receive a mileage reimbursement since the visit did not result in any additional cost to the employee.

### **International Travel**

Effective July 1, 2000, all foreign travel must be approved by the President of the University before the travel is begun. The request for travel authorization form must be accompanied by a well-defined proposal stating the particular programmatic benefits that will be derived from the travel.

### **Travel for Employee Recruitment**

The Office of Human Resources coordinates all travel arrangements for all faculty and staff recruitment in conjunction with the corresponding department's schedule. Travel Authorization Forms must be completed for each candidate and approved by the Director of Human Resources. After approval has been obtained, the Office of Human Resources coordinates the travel arrangements through International Tours or other Lincoln University approved travel agency.

If the candidate lives within driving distance (150 miles) of Lincoln University, the candidate will be expected to use their personal vehicle to travel to Lincoln University and will be reimbursed for mileage and reasonable expenses after submitting original receipts to the Office of Human Resources.

Please note that the most economical travel will be used unless the arrangements are detrimental to the candidate and/or department's schedule. Unreasonable travel expenses, i.e., car rental charges, hotel reservations, etc., will not be reimbursed unless approved in advance by the Director of Human Resources.

### **Substantiation of Expenses**

In general, receipts for expenses incurred by the employee must be attached to the claim that is submitted for reimbursement. A Statement of Travel Expense Report, with all receipts attached, is required to be submitted to settle all travel advances, regardless of whether the actual expenses incurred were less than or more than the amount of the advance. Advances in excess of substantiated expenses shall be repaid to the University immediately upon completion of the travel for which the advance applied. Receipts are required for all expenses.

*Expenses that generally will be reimbursed include the following:*

- Car rental fees, only for compact or mid-sized cars.
- Fares for shuttle or airport bus service, where available; costs of public transportation for other ground travel.
- Taxi fares, only when there is no less expensive alternative.
- Overnight stays for seminars or training programs will be approved when the distance is greater than 55 miles one way.
- Cost of standard accommodations in low to mid-priced hotels, motels, or similar lodgings. Unless the employee is able to obtain lodging in the same facility as the conference. In this case the University will pay for lodging at a higher priced hotel or motel.
- Cost of meals, no more lavish than would be eaten at the employee's own expense, to a maximum of \$50.00 per day, including taxes and tips, for overnight

stays. A maximum of \$30.00 per day, including taxes and tips, for day travel of six (6) hours or more.

- Tips (are inclusive of the daily meal per-diem) not exceeding 18% of the total cost of a meal or 10% other.
- Charges for telephone calls, fax, and similar services required for business purposes.
- Charges for one personal telephone call each day for overnight stays.

## **APPENDIX (Forms)**



**PURCHASE REQUISITION**

NO. 911980

**LINCOLN UNIVERSITY**  
 1570 Old Baltimore Pike  
 P.O. Box 179  
 Lincoln University, Pennsylvania 19352

**CHECK REQUEST**  
NOTE: PETTY CASH CAN BE USED  
 FOR PURCHASES UNDER \$99.99

**PURCHASE  
 REQUISITION**

**PRE-AUDIT** \_\_\_\_\_

DATE \_\_\_\_\_

Suggested Vendor \_\_\_\_\_ P.O. No. \_\_\_\_\_

Address - Number & Street \_\_\_\_\_

City, State & Zip Code \_\_\_\_\_

Telephone No. \_\_\_\_\_ Fax No. \_\_\_\_\_

Department \_\_\_\_\_ Dept. Code: \_\_\_\_\_

Date required \_\_\_\_\_ Object Code: \_\_\_\_\_

QUANTITY	FURNISH COMPLETE DESCRIPTION INCLUDING CATALOG NUMBER, SIZE, COLOR, CUTS ETC. AND PURPOSE	UNIT PRICE	AMOUNT
<b>TOTAL REQUISITION</b>			

UNIVERSITY POLICY: The Office of the Vice President for Fiscal Affairs and the Purchasing Dept. are vested with sole authority to order materials and contract for service. The University will assume no obligation except on a duly authorized PURCHASE ORDER. The University pays vendors net 30 days.

Approved by \_\_\_\_\_ Dept. Head or Program Director      Approved by \_\_\_\_\_ Budget Office

Approved by \_\_\_\_\_ Vice President      Approved by \_\_\_\_\_ Vice President for Fiscal Affairs and Treasurer

**PURCHASING**

**TITLE III**  
**REQUISITION JUSTIFICATION**

<b>NAME:</b>	_____		
<b>ACTIVITY:</b>	_____		
<b>DATE:</b>		<b>REQUISITION #:</b>	

**DESCRIPTION OF PURCHASE:**

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**DESCRIPTION OF HOW THIS PURCHASE HELPS FULFILL THE GOALS OF THIS ACTIVITY:**

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**SPECIAL PROGRAM VOUCHER**

**LINCOLN UNIVERSITY**

**SPECIAL PROGRAM VOUCHER  
FOR  
TITLE III PROGRAM**

**ACTIVITY-  
92-s**

**Payee: \_\_\_\_\_ Payment Due : \_\_\_\_\_**

**Mailing or other instructions for issuing check: \_\_\_\_\_**

<b><u>PURPOSE</u></b>	<b><u>AMOUNT</u></b>	<b><u>18 DIGIT CODE</u></b>
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
	<b>TOTAL</b> _____	

**Director approval \_\_\_\_\_ Approval Date: \_\_\_\_\_**

**Activity Director approval \_\_\_\_\_ Approval Date: \_\_\_\_\_**

**Program Coordinator approval \_\_\_\_\_ Approval Date: \_\_\_\_\_**

**FOR BUSINESS OFFICE USE**

**Business Office Approval: \_\_\_\_\_ Approval Date: \_\_\_\_\_**

**Check No.: \_\_\_\_\_ Voucher No. \_\_\_\_\_ Date: \_\_\_\_\_**

**MEMORANDUM: \_\_\_\_\_**

**MEMO FOR RETURNING REQUISITIONS/CHECK REQUESTS**

**M E M O R A N D U M**

TO:

FROM:

Title III Program Coordinator

DATE:

RE:

The attached is being return for the following reason(s):

- \_\_\_\_\_ Purchase not allowed under Title III
- \_\_\_\_\_ Title III requisitions must begin with "9"
- \_\_\_\_\_ Needs Vendor information
- \_\_\_\_\_ Needs address
- \_\_\_\_\_ Needs phone number
- \_\_\_\_\_ Department must include "Title III, activity number and department name"  
Example: "IT for Counseling and Career Services" should be:  
"Title III Activity II Student Life and Development, Counseling and Career Services"
- \_\_\_\_\_ Missing/Incorrect Department Code
- \_\_\_\_\_ Missing/Incorrect Object Code
- \_\_\_\_\_ Date required needed
- \_\_\_\_\_ Sum of amount column does not equal Total Requisition amount
- \_\_\_\_\_ Requisition amount exceeds available funds
- \_\_\_\_\_ Needs signature of Activity Director
- \_\_\_\_\_ Needs signature of Vice-President
- \_\_\_\_\_ Submit with copy of requisition and purchase order
- \_\_\_\_\_ Needs Special Program Voucher (2)
- \_\_\_\_\_ Needs Justification for purchase
- \_\_\_\_\_ Needs support documents
- \_\_\_\_\_ Purchase was not authorized
- \_\_\_\_\_ Travel was not authorized
- \_\_\_\_\_ Other \_\_\_\_\_  
\_\_\_\_\_

**TITLE III  
COMPUTER/EQUIPMENT LOCATOR FORM 1**

Name of person using Title III computer/equipment: \_\_\_\_\_

Title of person: \_\_\_\_\_ Activity #: \_\_\_\_\_

Check one:  Title III Director     Faculty Member     Other \_\_\_\_\_

Department: \_\_\_\_\_ Building: \_\_\_\_\_ Room: \_\_\_\_\_

Jack #: \_\_\_\_\_ IP address: \_\_\_\_\_

E-mail address: \_\_\_\_\_ Extension: \_\_\_\_\_

Equipment ID:

ID	COMPUTER	MONITOR	PRINTER	OTHER
Model #				
Serial #				
Title III ID #				

**GUIDELINES FOR USE OF TITLE III COMPUTER/EQUIPMENT AT LINCOLN UNIVERSITY**

1. COMPUTER/EQUIPMENT MUST REMAIN IN ABOVE LOCATION.
2. CONSENT OF TITLE III PROGRAM COORDINATOR IS REQUIRED TO MOVE COMPUTER/EQUIPMENT.
3. ANY DAMAGES OR LOSS TO COMPUTER/EQUIPMENT MUST BE REPORTED TO TITLE III PROGRAM COORDINATOR IMMEDIATELY.
4. PERSON USING COMPUTER/EQUIPMENT IS RESPONSIBLE FOR PROPER USE AND MAINTENANCE.
5. FAILURE TO COMPLY WITH ABOVE GUIDELINES WILL RESULT IN LOSS OF PRIVILEGE TO USE TITLE III COMPUTER/EQUIPMENT.

I agree to the above guidelines.

SIGNATURE \_\_\_\_\_

DATE \_\_\_\_\_

**TITLE III  
COMPUTER/EQUIPMENT LOCATOR FORM 2**

Department responsible for Title III computers/equipment: \_\_\_\_\_

Director of Department: \_\_\_\_\_ Activity #: \_\_\_\_\_

E-mail address: \_\_\_\_\_ Extension: \_\_\_\_\_

Intended use of computers/equipment: \_\_\_\_\_

Location of computers/equipment: \_\_\_\_\_

Equipment ID: \_\_\_\_\_

ITEM	MODEL #	SERIAL #	TITLE III #	ITEM	MODEL #	SERIAL #	TITLE III #
COMPUTER				COMPUTER			
MONITOR				MONITOR			
COMPUTER				COMPUTER			
MONITOR				MONITOR			
COMPUTER				COMPUTER			
MONITOR				MONITOR			
COMPUTER				COMPUTER			
MONITOR				MONITOR			
COMPUTER				COMPUTER			
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COMPUTER				COMPUTER			
MONITOR				MONITOR			
COMPUTER				COMPUTER			
MONITOR				MONITOR			

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I agree to the above guidelines. SIGNATURE \_\_\_\_\_ DATE \_\_\_\_\_





**TIME AND EFFORT QUARTERLY REPORT**

**(Department)**  
**Title III Performance Report**  
**For Quarter Ending \_\_\_\_\_**  
**Activity \_\_: \_\_\_\_\_**

Activity Status

Goal \_\_\_:

1. Objectives for quarter

*NARRATIVE*

2. Accomplishments

*NARRATIVE*

3. Obstacles in achieving goal

*NARRATIVE*

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Employee's Signature

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Title III Program Coordinator

**FULFILLMENT OF CONTRACT REPORT**

You must submit this to the Title III Program Coordinator. He must sign (certify) your fiscal year work (October 1<sup>st</sup> to June 30<sup>th</sup>).

The Title III Program Coordinator will then send it to Special Programs with his certification memorandum.

**SAMPLE**

**MEMORANDUM**

TO: Title III Program Coordinator

FROM:

DATE:

SUBJECT: Fulfillment of Contract

I have fulfilled the requirements for the \_\_\_\_\_ contract. I taught two courses in \_\_\_\_\_. In addition, I spent time with the students discussing their action plans and helped arrange their visit to the Rotary Club in Oxford. I spent considerable time trying to arrange internships with Ben and Jerry’s in Vermont. The students preferred to fulfill their internships in Washington and New York. I was able to interact and socialize with the students on a formal and informal basis because I live on campus.

The breakdown of my time spent of this program was as follows:

<u>TASK</u>	<u>HOURS OF EFFORT</u>
Literature Review	15
Preparation of Course Work and Materials	25
Lectures and Workshops	30
Administrative Duties	5
Internship Arrangements	<u>5</u>
TOTAL HOURS SPENT	80

\_\_\_\_\_ has the evaluations I received from the students. I was totally dedicated to this project and the students. The feedback I got was that the material I presented, the format and the applied nature of my material were relevant to the students’ expectations and environment.

I will appreciate payment for this contract since I have fulfilled all the responsibilities. I will be happy to answer any questions related to this matter.

Thank you.

\_\_\_\_\_  
Administrator/Faculty

\_\_\_\_\_  
Title III Program Coordinator

**CERTIFICATION OF FULFILLMENT REPORT**

TO: Special Programs Director

FROM: Title III Program Coordinator

DATE:

RE: Fulfillment of Contracts for Title III

The following Title III personnel have satisfactorily fulfilled the requirements of the Title III Program for the time period from \_\_\_\_\_ to \_\_\_\_\_. They have satisfactorily completed their responsibilities both in terms of the number of hours of effort expected to be put forth and in the relationship to the tasks assigned to them. Please initiate payment due to them under the Title III Program:

*(List of Title III Personnel)*

Thank you for your assistance.

