

## B - Purchasing Policy

All purchases made on behalf of HCU must have prior approval before the purchase is made.

### Article I - President Approved Purchases

- Section 1      **Purpose** - When an unexpected, emergency, or time sensitive purchase of \$350 or less is needed to be made, the purchaser must first get approval from the HCU President.
- Section 2      **Approval** - A copy of the request must be sent to the President via E-mail within 24 hours of approval. When the president approves a purchase, notification will be sent to the Treasurer.
- Section 3      **Office Supplies** - When a member requires office supplies, they must first determine if HCU already has a stock of the supplies.
- Section 4      **Emergency Situation** - In the event that an officer is unable to get approval before a purchase is made, the member must notify the HCU President at the next available opportunity. This notification will include an explanation of the emergency situation.
- Section 5      **Pre-Approval** - The president may pre-approve a member to make certain types of purchases without knowing the total cost. When this happens, the President will set a maximum amount that the member is allowed to spend. Once the purchase is complete, the member will notify the President that they have bought an item.
- Section 6      **Mileage** - A member must get prior approval from the President if they plan to travel on behalf of the Union. The following activities are pre-approved for mileage reimbursement:
- a. Meeting with a member(s)
  - b. Meeting with HSD management
  - c. Working at the HCU Office
  - d. Going to a store to purchase an approved item
  - e. Delivering items to a worksite

### Article II - Board Approved Purchases

- Section 1      **Board Approval Threshold** - Any single purchase over \$350 must be approved by the board before it is purchased. Prior to the purchase, a request must be presented at an executive board meeting by an officer of the board.
- Section 2      **Recurring Purchases** - Any product or service that includes a recurring charge must be approved by the board.
- Section 3      **Record Keeping** - All board approved purchases shall be included in the meeting minutes. A log of all board approved purchases for the year shall be maintained by the Treasurer.
- Section 4      **E-mail Approval** - In the event that a purchase is time sensitive and cannot wait for the next Board meeting, the President may use e-mail to get majority approval from the board. These purchase request shall be noted as a roll call vote in the minutes for the next executive board meeting.

## Article III - Expense Reporting

- Section 1     **Reporting Date Ranges** - Expense reports shall cover all purchased be from the first day of a month to the last day of a month.
- Section 2     **Board Approval** - Any expense report that contains items older than sixty (60) calendar days must be approved by the board. All expense reports must be received before the last day of the fiscal year.
- Section 3     **Explanation** - All items on an expense report shall have an explanation of what the expense is for and the date purchased. The following items have additional requirements:
- a. Food - The meeting or event attended.
  - b. Mileage - The location and name of the event or meeting. If the location is not an HSD site, the HCU Office, or the AFTOR office, the address will be included.
  - c. Physical items - The purpose or use of the item.
  - d. Technology - The manufacturer name, model number, and serial number in addition to the purpose. Packing material that includes the device information shall be provided to the Office Manager for processing.
- Section 4     **Documentation** - An itemized receipt for all purchases shall be included with the expense report. A photocopy of thermal printed receipts will be included with the expense report. Mileage reimbursements for unbudgeted events shall include a flyer, brochure, or event notes. If a member purchases food on behalf of others, the names of those people shall be included with the receipt.
- Section 5     **Meal Allowance** - When a member attends a board approved event, they are authorized to purchase meals for themselves and other board approved attendees while attending the event. If the event does not run all day, the member may purchase a meal every three hours spent at the event. The cost for these meals shall not exceed the following individual meal allowance:
- a. Breakfast - \$20 per meal
  - b. Lunch - \$25 per meal
  - c. Dinner - \$30 per meal
- Section 6     **Meal Allowance Restrictions** - Reimbursed meals have the following restrictions:
- a. No Alcohol will be reimbursed
  - b. The member may not be reimbursed for a meal that is provided by the event
  - c. The member may not be reimbursed for meals provided to friends or family.
- Section 7     **All Day Event Meal Allowance** - If a member is attending an all-day event, any meal not provided by the event may be combined into a daily allowance. The normal meal limits do not apply, but the daily total may not exceed the daily allowance of \$75.
- Section 8     **Mileage** - Distances driven on behalf of the Union will qualify for reimbursement at the IRS standard mileage rate for businesses rounded up to the nearest whole cent.

END OF POLICY  
APPROVED 8/30/2017