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## Memorandum

**To:** All Center for Science (CFS) Group II  
Departments

**Date:** 4/20/12

**From:** Joel Neel, Director, Facilities Planning &  
Capital Projects  
Barbara Queen, Project Manager  
Silas Pompa, Financial Analyst

**Copies:** Johan Uyttewaal  
Leigh Ramirez  
Brenda Tesch  
Suzanne LaCaro

**Subject: Center for Science (CFS)– Group II Purchases**

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Thanks to everyone for getting your Group II expenditure plans to us for submittal to the Chancellor's Office. This list has been approved by the Chancellor's Office and a copy is attached.

The following process will be utilized when expending the CFS Group II Funds:

1. The College/Department's designated "requestor" enters a purchase requisition into PeopleSoft financials, attaches the backup, and places it "on hold for further processing". The requestor emails the Group II PR "purchase requisition" number and any supporting documentation to Silas Pompa, Facilities. When completing the online requisition, refer to the Group II Requisition instructions for additional necessary fields, such as: item number, Group II note, chart field string including class.

If an item exceeds the budgeted line amount or the department would like to purchase an item that is not on the approved list, a substitution form is required with the package as well (copy attached). Substitution requests less than \$20,000 may be approved by Facilities Planning and Capital Projects; substitutions greater than \$20,000 require Chancellor's Office Approval. Substitution forms are also available <http://www.afd.calpoly.edu/facilities/forms.asp>. Project manager will notify you when the substitution request has or has not been approved.

2. Facilities Planning and Capital Projects (FP&CP) will confirm the equipment purchase and approve the PR electronically. Written approval will be emailed to both the requestor and to [purchasing@calpoly.edu](mailto:purchasing@calpoly.edu) to confirm that a purchase order can be issued.
3. Contracts and Procurement Services will issue the PO and the requestor will be notified via email once the PO has been dispatched, (please note this PO number for future reference).
4. A Group II Project Manager will be assigned to this project for all Group II equipment receiving. Equipment will be received by the Group II Project Manager, however, if a department receives an order or invoice directly, they should notify the Project Manager to confirm receipt of the equipment or process the invoice. FP&CP will approve the invoice and forward to the accounts payable department.

5. All purchases need to be encumbered by October 31, 2013 and all funds must be expended by February 28, 2014.
6. Purchasing with Group II funds must adhere to the CSU purchasing policies. Please call 756-2232 or refer to the Contracts, Procurement, and Risk Management website at <http://www.afd.calpoly.edu/cprm/procurement.asp?pid=2>.
7. The use of Pro-cards **is not** allowed under the Group II procurement process.

Financial analyst will send account updates periodically that will identify actual expense and account balance. If you have any questions or concerns about the process, please call Silas at 756-2822 or [spompa@calpoly.edu](mailto:spompa@calpoly.edu).

Attachments:

Approved Group II List  
Group II Purchase Requisition  
Department Class Codes  
Substitution Form