

School Discretionary & Institutional Program (SDIP) Processing Instructions April 2024

All Purdue University Staff members processing or approving SDIP fund requests should be familiar with the guidelines pertaining the purpose and the intended use.

The four **Key** statements below are indicated within the SDIP guidelines and valuable information to keep in mind when processing SDIP request.

https://prf.org/documents/discret_guidlines.pdf

Background:

- School Discretionary and Institutional Program (SDIP) funds are unrestricted charitable contributions made by alumni, friends, corporations, staff, and faculty.
- These contributions are donated to fund expenditures that will enhance program and departmental missions, goals, and objectives.

Philosophy:

- Good stewardship of funds includes expending funds in support of the purpose for which they were given.
- The unrestricted nature of SDIP funds does not absolve the University and foundation of their stewardship responsibilities.
- A good test for the appropriate use of gift funds is: Would you ask a donor to contribute money for this purpose?

Procedures:

- SDIP funds should be expended through the Purdue Research Foundation (PRF) for expenditures that are unallowable on university funds.
- Any expenditure which benefits the authorizer personally or which might represent a conflict of interest based on relationship to the authorizer is unallowable.
- SDIP funds will be transferred to the University when expenditures are allowable on university funds.
- These transfers will be recognized as gift income to the University.

Processing SDIP Request

- When requesting SDIP funding, departments should describe the business reason for the expenditure, in addition to providing proper backup documentation, including original receipts.
- If original receipts are not available, an explanation must be attached to the request.
- Requests for reimbursements must be within 12 months of the event.

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SDIP Associated Forms located on our website:

<https://prf.org/financial-services/>

Discretionary Fund Request (DFR)

<https://prf.org/financial-services/Discretionary-Fund-Request-6.30.22-1.pdf>

DFR Purpose

- Requesting SDIP funding to be used:
for the purpose of transferring SDIP funds from PRF to a Purdue University account, to pay a vendor for SDIP related expenses, or to reimburse an individual for SDIP expenditures made with a personal credit card.
- To request an internal Transfer of Funds from one SDIP account to another.

Prior to submitting a DFR form and documentation ensure the purpose is allowable.

SDIP Common Allowable Expenditures

- Athletic Tickets and seating purchases used for Donors or Alumni relations.
- Alcohol purchases for Purdue University approved events and, or Business Meeting.
- Decorations for Purdue University approved events or departments functions.
- Event Rentals: tables, chairs, linens, or audio equipment...etc.
- Funeral flowers and sympathy cards for exclusively:
Purdue University students, staff, and donors.
(funeral flowers or memorials gifts for family members is **not** allowable)
- Fund-raising expenses that are not appropriate per the University policy.
- Gift or Awards purchases for Purdue University approved events.
- Give-a-way for promoting purposes – generally for tailgates.
- Mailing supplies and postage for promotional use.
- Printing for programs, cards, promotional documentation.
- Retirement gifts – refer to policy for detailed guidelines.
- Seasonal Flowers used for common areas.
- Small appliances for departmental use, donors or alumni.

SDIP Unallowable Expenditures

- Gift cards or gift certificates should Not be purchased.
- Memberships.
- Office parties, holiday parties, or decorations.
- PU hospitality funds must be used for approved events or meetings when only food is purchased.
- Travel expenses for spouses of university officials not acting as official volunteers or representatives of the University.
- Unapproved sponsored gifts or benefits to employees.

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DFR Instruction for Payment Requests

Include the following information.

- WBSE or Internal Order # for PU Transfers
- Processing Date
- PRF-PU Discretionary Account # 7 Digits# starts with an 82xxxxx or 80xxxxx
- Departments (full name)
- Prepared By
- Phone Number for PU contact #
- Payable To:
 - Include Purdue University for transfers, Vendor or Individual name and a complete address.
 - For individual reimbursements their home address must be used.
- In the body of the DFR indicate the purpose and business reason for the request.
- Include proper backup documentation and receipts.
- If receipts are not available, an explanation must be attached to the request.
- The request must be approved by an “Authorized Signor.”

The approvers name must be listed on the DSAF associated with SDIP account being used for request.

DATE _____

PURDUE
RESEARCH FOUNDATION

DISCRETIONARY SIGNATURE AUTHORIZATION FORM
Please Print or Print Clearly

PRF DISCRETIONARY ACCOUNT # (7 digits) _____

DEPARTMENT _____

Contact Name _____ Email Address _____

Campus Address _____ Phone Number _____

Print Name(s) and signature(s) of the individual(s) authorized to approve expenditures from account indicated above

PRINT NAME	SIGNATURE
_____	_____
_____	_____
_____	_____
_____	_____

Approved Unit Head Printed Name _____ Approved Unit Head Signature _____

Example.

Requested for items in PU:
Internal Order# or WBSE#

PURDUE
RESEARCH FOUNDATION

DISCRETIONARY FUND REQUEST
Please Print or Print Clearly

DATE _____ PRF DISCRETIONARY ACCOUNT # (7 digits) 80xxxxx or 820xxxx

DEPARTMENT (full name) _____

FORM PREPARED BY _____ PHONE # _____

PAYMENT REQUEST: amount, department name, account # and department

UNIVERSITY ACCOUNT # (if applicable) N/A

PURPOSE OF EXPENSE _____

PAYABLE TO _____ AMOUNT \$ _____

TRANSFER FUNDS TO ANOTHER PRF DISCRETIONARY ACCOUNT

TO PRF DISCRETIONARY ACCT # (7 digits) _____ AMOUNT \$ _____

PURPOSE OF TRANSFER _____

Authorized Signature _____ DAN

Printed Name _____

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DFR Instruction for TRANSFER FUNDS TO ANOTHER SDIP

Include the following information.

- Processing Date
- PRF-PU Discretionary Account # 7 Digits
 - # starts with an 82xxxxx or 80xxxxx
 - For TRANSFER OF FUNDS (this is the debiting account to be used)
- Departments (full name)
- Prepared By
- Phone Number for PU contact #
- Enter (7 digits) account number to be transferred.
- Amount
- Purpose of Transfer
- Authorized Signature and Date

Example.

PURDUE
UNIVERSITY OF INDIANA

DISCRETIONARY FUND REQUEST
Please Type or Print Clearly

Required for forms in PU:
Internal Order# or WBSE#

DATE: _____ PRF DISCRETIONARY ACCOUNT # (7 digits) 800xxxx or 820xxxx
DEPARTMENT (Full Dept. Name): _____ PHONE #: _____
FORM PREPARED BY: _____

PAYMENT REQUEST (REQUIRED FOR DISCRETIONARY FUNDS WITH AN INDIANAPOLIS ACCOUNT)
UNIVERSITY ACCOUNT # (if applicable) N/A
PURPOSE OF EXPENSE: _____

PAYABLE TO: _____ AMOUNT \$: _____

TRANSFER FUNDS TO ANOTHER PRF DISCRETIONARY ACCOUNT
TO PRF DISCRETIONARY ACCT # (7 digits) _____ AMOUNT \$: _____
PURPOSE OF TRANSFER: _____

Authorized Signature: _____ Date: _____
Printed Name: _____

Send completed requests and documentation to prfap-discretionary@prf.org

Rejected/Returned DFR Forms

Incomplete requests will be rejected/returned.

- Returned DFR will not be saved, nor additional reminders sent.
- It is the PU requesters responsibility to resubmit.

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SDIP Common DFR Processing Delays

- The Payable to Vendor or Individual does not have an established PRF-AP ID
 - IRS Form W-9 is needed.
- DFR missing Internal Order/WBSE # for PRF-PU Transfers
- SDIP Account number is missing or is incorrect.
- The authorized signer is not listed on the DSAF held at PRF.
- The Payable to address is missing.
- Documentation or receipt is not included.
- The SDIP funds are not available.

Discretionary Signature Authorization Form (DSAF)

https://prf.org/documents/discretionary_signature_form_update_2011.pdf

Each PU Department must complete a DSAF for all responsible SDIP accounts.

The DSAF is kept on file at PRF and used to reference Authorized Signatures for each submitted DFR.

Department Action Needed for Non-Authorized Signatures

- A New **DSAF** can be completed and submitted to prfap-discretionary@prf.org.
It is most important to submit a **New DSAF** when departmental staff changes occur.
- Or obtain an **Authorized Signature** from an individual listed on the DSAF on file.
- To inquire who your departmental SDIP approvers are send an email requesting this information to: prfap-discretionary@prf.org

New Vendors or Individual - W-9 form

<https://www.irs.gov/pub/irs-pdf/fw9.pdf>

A Vendor or Individual does not have an established PRF AP-ID.

- Prior to processing a new vendor/individual request an official IRS W-9 form must be completed properly, signed, and dated.
- *A Sub-W-9 is **not acceptable**.*
Purdue Research Foundation and Purdue University have diverse accounting systems and unlinked financial accounts. The Sub-W-9 should only be used for PU AP request.

Forms containing sensitive information should be shared with tkgick@prf.org through the PU File Locker.

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SDIP Miscellaneous

PRF discretionary name change or new SDIP request Form

<https://prf.org/financial-services/PRF-discretionary-name-change-or-new-SDIP-request-Form-.pdf>

Purdue University Hospitality Policy (II.A.1)

<https://www.purdue.edu/policies/business-finance/ia1.html>