

## Sustainability Innovation & Engagement Fund FINANCIAL Implementation Guidelines

### BASICS

- All funds allocated must have the oversight of a faculty or staff member
- All purchases must be made in accordance with university rules and regulations including: University ProCard policies and University Procurement policies.
  - Procurement policies are located here <https://www.umass.edu/procurement/purchasing-policies>
  - ProCard guidelines are located here <https://www.umass.edu/procurement/procard-manual>
  - Questions regarding these policies can be directed to the Procurement Department at 545-0361
- Equipment purchases greater than \$1,000 must be tagged for inventory purchases. Details are located here <https://www.umass.edu/controller/property-office-0> . Questions regarding this policy can be answered by the Controller's Office staff at 545-0806.
- Cash Handling must strictly adhere to the policy found here <https://www.umass.edu/controller/collection-security-guidelines> Questions regarding this policy can be answered by the Controller's Office staff at 545-0806.

### STEP-BY-STEP

- Once you have received notification that your proposal has been approved for funding and you have finalized the cost of your project you should contact the Campus Sustainability Manager for a final review
- The Campus Sustainability Manager will contact the Budget Office for allocation of the funds
- You must have a separate general funds (fund 51342) chartfield string to capture your project costs. The only thing that should be charged to the chartfield string should be the costs funded by the Sustainability Innovation & Engagement Fund. The faculty or staff member supervising the funds should request the chartfield string from the Controller's Office using this form located on this page <https://www.umass.edu/controller/chartfield-maintenance> (select Chartstring Create New Request Form )
- Once the budget has been allocated you can proceed with the charging required to implement the project
- Once the project has been completed, notify the Campus Sustainability Manager and the Budget Office so that the project can be closed out.
- Any funds remaining at the end of the project will go back into the Sustainability Innovation & Engagement Fund for future project.
- Questions regarding your budget can be directed to the Budget Office at 545-2141.