

STANDARD OPERATING PROCEDURE

Purchasing Plan



Department: Operations

SOP#129

Applicable to: All Staff

Effective Date: 15 Dec 2020

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Authority: Chief Of Operations

Applicable CAAS Standard:

Revised Effective Date:

Purpose:

The purpose of this Standard Operating Guideline (SOG) is to outline the position of Brighton Volunteer Ambulance (BVA) regarding expenses generated by Operations Staff.

Scope:

The scope of this document applies to the Operations Staff members with an assigned budget.

Guideline:

1. Assigned budgets:
 - a. Annually, budget holders will be provided with a budget corresponding to their assigned responsibilities.
 - b. Budget holders are responsible for managing their expenses within the provided budget.
 - i. Any excesses will need to be reported to the Chief as soon as there is an expected overage.
 - ii. Generally, Operations lines are spread across twelve months. In some circumstances more accurate monthly forecasting of funds may be possible and followed.
 - iii. Any funds not spent in excess of 10% of the budgeted amount will be reported to the Chief as soon as there is an expected under spend.
 - iv. Officers will report monthly their spending activity, as well as verify their assigned accounts for proper coding and alignment once provided.
2. Purchasing accountability:
 - a. Anytime BVA funds are expended, a unique Purchase Order number will be assigned by entering the order in the Purchase Order Log.
 - b. By utilizing the Purchase Order log, specific orders in question will be easily verified.
3. Expense Reports
 - a. Any expenditures on company credit cards or accounts will need an Expense Report filed with copies of the receipt, packing slip(s), and or invoices. These must be submitted to the Business Office monthly.
 - b. Any expenses must be signed off on by the direct supervisor.
4. Travel
 - a. Travel related expenses are governed by the Employee and/or Volunteer Handbook.

This document supersedes any documents on the topic dated prior to the effective date noted above.