

*Office of Procurement Services & Accounts Payable*

**Date**: xx/xx/xxxx

**To**: Denis O’Brien, Interim President

**From**: Julie Jones, Vice President & Chief Procurement Officer, Accounts Payable & Procurement Services

**RE: PO Requisition [Req Number] to [Supplier Name]** for an estimated $\_\_\_\_.

# Approved,

# [Department Head’s Name, Title, & Department]

***Approved***,

Julie Ann Jones, Vice President & Chief Procurement Officer, Accounts Payable & Procurement Services

# Approved,

# Helen Y. Bowman, Executive Vice President, Treasurer and Chief Operating Officer

# Approved,

Denis O’Brien, Interim President



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**Summary:** [Include relevant context, financial information, explain the need for the good/services, etc.]

**Competitive Bidding Background:** [Provide overview of RFP/competitive bidding process, including when this was most recently bid out. If not currently applicable (e.g., we are under contract), note when this will next go out to bid. If a sole source, you must provide a justification which complies with the Purchasing Policy (see Section I(2) on p. 5).]

**Budget Status:**

[Memo must address the following:

* Is this expense currently budgeted?
	+ If YES, identify in detail how any cost increase over prior year(s) will be funded
	+ If NO, how will this be funded? Has this new proposed expenditure been reviewed prior to this memo?
* ROI—Whenever applicable, identify any projected return on investment, particularly with new expenses or increased expenses.]

**Cost Center:** [TBD]

**Amount:** [TBD]

**Department:** [TBD]

**Contact:** [Email | Phone Number (if applicable)]

**Thank you.**