



Foundation Funds

What can I use my funds for?

- Funds can be used for items outside of your Oregon Tech Budget; such as professional development, events, equipment needs, and gifts.
- Funds can also be used for things that cannot be purchased with Oregon Tech funds; such as alcohol.

How do I check my fund balance?

- Monthly fund balance reports are emailed to the Deans, Department Chair, Office Manager, and/or Advisors. Please note that if you are not receiving these reports, email your request to foundation.reimbursement@oit.edu. These reports come from the Foundation office and not the Business Affairs Office (BAO).

Individual reimbursement:

1. Complete the BAO Personal Reimbursement form and through the University for processing (follow BAO policies and procedures). Submit a ticket with the BAO if you need assistance.
2. Complete the Foundation Request form.
 - a. Attached a copy of the personal reimbursement, receipt, and supporting documentation.
3. The Budget Authority will need to review and sign the Foundation Request Form. Note: if reimbursement is for budget authority, supervisors must sign as budget authority.
4. Email Foundation Request and documents to foundation.reimbursement@oit.edu

Invoice payments:

1. Follow the University process when it comes to paying a vendor invoice. If you need assistance with the process, submit a ticket with the BAO. Submit a ticket to the BAO if you need assistance.
2. Complete the Foundation Request form
 - a. Attach a copy of the invoice and supporting documents
3. The Budget Authority will need to review and sign the Foundation Request Form.
4. Email the Foundation Request and documents to foundation.reimbursement@oit.edu

Oregon Tech P-card Purchases

1. Purchase items with your department p-card or travel p-card
2. Code in Banner using your index ending in 430 (ex. MET430)
3. Complete the Foundation Request form. Attach receipt and supporting documents.
4. The Budget Authority will need to review and sign the Foundation Request Form.
5. Email the Foundation Request and documents to foundation.reimbursement@oit.edu

Revised 08/04/2026



Oregon Tech Foundation is a separate entity with separate accounting records, finances, policies and guidelines from the Oregon Institute of Technology. We owe it to our donors to keep accurate records to ensure their donor dollars are being utilized to their expectations.

Department Fund Access Request Form

Name: _____ Department: _____

Mailstop: _____ Extension: _____

Title: _____

Reimbursement Information

STEP I

Brief description of expenditure(s):

STEP II

Preferred Method

Please reimburse my institutional account with the following information:

- Index: _____
- Amount: \$ _____
- Foundation Account/Fund Name: _____

Alternate Method

This method is to be used to reimbursing an individual paying for alcohol, if alcohol is provided at an event not located on campus. **Alcohol cannot be purchased with an Oregon Tech P-card. Following information needed:**

- Individual/Business Name: _____
- Amount: \$ _____
- Foundation Account/Fund Name: _____
- Campus Mailstop or Mailing Address: _____

All receipts and supporting documents attached.

STEP III

I hereby authorize the above-described expenditure and request for funds.

Signature of Budget Authority: _____ Date: _____

Email request form and supporting documents to: foundation.reimbursement@oit.edu