



TechSoup Request Processing Standard Operating Procedure Instructions

Version 1.7 * Last Updated: 9/24/09

NOTE: This standard operating procedure (SOP) is applicable only to Chapters who are not of 501(c)3 status. Per TechSoup restrictions, no organization with a 501(c)3 status (e.g. BDPA Education and Technology Foundation) can participate in TechSoup's program on behalf of another organization that also has a 501(c)3 status (e.g. a BDPA chapter with 501(c)3 status).

The TechSoup Request Processing SOP describes how BETF processes TechSoup requests donated or inexpensive software products to BDPA chapters. The process begins (Point A) with a software request documented with IRS Tax Receipt Form. The process ends (Point B) with BETF declination or delivery of the requested software to BDPA chapter.

Point A: Chapter submits IRS Tax Receipt Form requesting software

1. BETF will publish information on our website, blog or other communication venues to announce timeframes in which we are open for TechSoup requests. TechSoup accepts orders for most products only once between July 1 thru June 30. These announcements will clearly provide deadlines for participation.
2. BDPA Chapter will submit IRS Tax Receipt Form by fax to (202) 318-2194. Contact BETF by email (techsoup@betf.org) if there are questions. BETF TechSoup Coordinator handles all email traffic sent to techsoup@betf.org. The form should contain all relevant information/description for the desired software product(s).
 - a. Product information can be reviewed in TechSoup's website, www.techsoup.org
 1. Select "Get Products" under "Get Started" on left side of page.
 2. View products by selecting "Browse By Catalog" or "Browse By Partner" (who are vendors).
 3. Select vendor (partner) of interest.
 4. Select from the matrix of all available products
 5. Include the name, version, price and quantity of the software product that BDPA chapter wants to obtain from TechSoup on the IRS Tax Receipt Form.
 - Click on link for any products to review detailed information about that product version.
 - Review the 'Restrictions' section for any product you place on the IRS Tax Receipt Form. Some products are restricted from organizations that provide scholarship services.
3. BETF may pay for any request that predominantly supports the BDPA IT Institute or the SITES program.
4. If request is not funded by BETF, then it will be paid for by the BDPA Chapter or National BDPA from their treasury or their 'restricted' chapter fund

Point B: BDPA Foundation declination *or* delivery of requested software

1. BETF will notify BDPA chapter if we reject/decline the request.
2. BETF TechSoup Coordinator will place approved orders with TechSoup. BETF Treasurer (treasurer@betf.org) will make all payment for TechSoup orders. BETF Treasurer will notify the TechSoup Coordinator by email (techsoup@betf.org) when payment process is completed.



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3. BETF headquarters address (4423 Lehigh Road, Suite #277; College Park MD 20740) used for all physical inventory sent by TechSoup. BETF TechSoup Coordinator (techsoup@betf.org) will handle any TechSoup products that require download via the Internet.
4. BETF Executive Director will forward any physical inventory received from TechSoup to final destination (e.g., BDPA chapter).
5. BETF TechSoup Coordinator will document all product movement and maintain listing of any product IDs or license numbers. BETF TechSoup Coordinator will be share product IDs or other relevant inventory information with the BDPA Chapter or other IRS Tax Receipt Form designee.
6. BETF is not responsible for any technical service calls or other maintenance issues on TechSoup Requests requested via IRS Tax Receipt Form.

The BETF Chief Information Officer (CIO) owns this SOP. It is the responsibility of the BETF CIO to review this SOP on an annual basis to ensure that the information remains current.

Please contact BETF TechSoup Coordinator by email (techsoup@betf.org) if you have any questions or wish to discuss further.