



TechSoup Request Processing Standard Operating Procedure Instructions

Version 2.4 * Last Updated: 09/28/2017

NOTE: This standard operating procedure (SOP) is applicable only to Chapters who do not have their own 501(c)3 tax-exempt status. TechSoup restrictions prevent BDPA Education and Technology Foundation (BETF) from ordering products on behalf of another 501(c)3 organizations.

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 remains ready for TechSoup requests from BDPA chapters and NBOD. Please be aware that some vendors impose ordering restrictions between July 1 and June 30 while some others restrict ordering to once every 2 years. That information is published in the vendor information in TechSoup's website. Each BETF order will consist of a collection of all approved chapter or NBOD orders as one large order. Once BETF receives a new approved order request in a new time frame, BETF will publish information on our website, blog or other communication venues to announce timeframes in which we are open for TechSoup requests.
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). Product information can be reviewed in TechSoup's website, www.techsoup.org
 - If you know the product name, type it in the input window to the right of the Help selection to review detailed information about products and versions. **Then skip to the bullet instruction below beginning with "Include the name, version..."**. **OTHERWISE**; an example for continuing follows:
 - Hover over Product Catalog to view Software and Hardware Category selection.
 - For Microsoft software, click Microsoft.
 - Click Browse Microsoft Products to review detailed information about products and versions.
 - 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.
 - 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. BETF provides scholarship services.
3. BETF may pay for any request that predominantly supports 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



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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 Chief Financial Officer (treasurer@betf.org) will make all payment for TechSoup orders. BETF Chief Financial Officer will notify the TechSoup Coordinator by email (techsoup@betf.org) when payment process is completed.
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 while they are available for download from vendor source or until you have received product through mail. BETF TechSoup Coordinator will 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.