

Procedure #6210

Purchasing and Expenditures

Background

The college obtains goods and services that represent “best value” to the college by promoting open and impartial competition. There are three procurement processes. Each process is associated with a monetary threshold: **Small**, \$25,000 or less; **Intermediate**, between \$25,000 and \$250,000; and **Formal**, \$250,000 or more. Monetary thresholds are subject to change. To confirm the current monetary thresholds, access the Quick Procurement Guide available on the Guides & Handbooks tab located in the **Business Services** site on Employee Dashboard.

Originator:

1. Utilizes the resources available on the Procurement Services Documents tab located in the **Business Services** site on Employee Dashboard. Seeks assistance from **Procurement Services** if needed.

Small and Intermediate Purchasing Process

Originator:

1. **Small Process:** Purchases the goods utilizing a Procurement Card, or submits a check request with authorized signature to **Accounts Payable**.
 - 1.a. Requests for all standard/trade services must be submitted to **Procurement Services** on a completed, budget manager approved requisition, or contract worksheet prior to purchase.
2. **Intermediate Process:** Submits completed, budget manager approved requisition, or contract worksheet to **Procurement Services** as appropriate. Orders cannot be split or fragmented to avoid using the Intermediate Process.
 - 2.a. Collaboratively works with **Procurement Services** to determine the appropriate procurement method, and for more complex intermediate purchases, the development of technical specifications and evaluation criteria.

- Accounts Payable:** 1. Processes check request.
- Procurement Services:** 1. Processes requisition or contract worksheet utilizing the appropriate procurement method.
- Vice President/Chief Financial Officer:** 1. Signs all contracts or delegates authority to designee.
- Receiving Department:** 1. Receives, logs, and inspects packages/containers for damage. Submits shipping claims as necessary.
2. Delivers to department.

Formal Purchasing Process

- Originator:** 1. Submits request with preliminary technical specifications and evaluation criteria to **Procurement Services**.
2. Collaboratively works with **Procurement Services** in the development of a written cost analysis or written non-feasibility determination for standard/trade services contracts with an estimated contract price exceeding \$250,000.
- Vice President/Chief Financial Officer or Designee:** 1. Reviews/approves written cost analysis or written non-feasibility determination.
- Procurement Services:** 1. Reviews preliminary specifications and evaluation criteria. Works collaboratively with the Originator to modify as necessary.
2. Determines the appropriate competitive procurement method.
3. Completes formal solicitation documents. Publishes advertisement as required or when it is in the college's best interest.
- Procurement Services/Originator:** 1. Reviews Offers and recommends contract award.
- Procurement Services:** 1. Publishes written notification of college's intent to award the contract.
2. Publishes written notification of the notice to proceed after the **Vice President/Chief Financial Officer** or the **College**

Board of Education approves the contract.

**Vice President/Chief
Financial Officer:**

1. Is responsible for award of contracts less than \$250,000, except for book contracts awarded through the College Bookstore or College Library and furniture contracts awarded through the College Bookstore or the Capital Projects and Facilities Department, pursuant to the Community College Rules of Procurement and the College's Guidelines for Furniture Standards.
2. Submits recommendation for award to the **College Board of Education** for all contracts greater than \$250,000, except for contracts awarded:
 - 2.a. through intergovernmental agreements;
 - 2.b. to qualified nonprofit agencies providing employment opportunities for disabled individuals, or any other nonprofit agencies;
 - 2.c. directly to contractors as a result of cooperative contracts;
 - 2.d. for utilities (including electricity, telephone, garbage, sewer, water, telecommunications, internet service provider, etc.);
 - 2.e. from the expenditure of grant funds in their entirety;
 - 2.f. for rental or lease of space;
 - 2.g. for the purpose of purchasing services for a consortia of colleges or other non-profit entities where the college acts as the facilitating agent;
 - 2.h. for books through the College Bookstore or College Library;
 - 2.i. for furniture through the College Bookstore or the Capital Projects and Facilities Department, pursuant to Community College Rules of Procurement and the College Guidelines for Furniture Standards;
 - 2.j. for the purpose of maximizing revenue;
 - 2.k. for Employee Benefit Plans exempt from the Public Contracting Code;

- 2.I. for “Sole Source” contracts subject to Community College Rules of Procurement, Rule CCR.310.
3. Submits Special Procurements requests (e.g. Construction Manager/General Contractor, Alternative Contracting Method—Two Step Process for Construction) and the supporting findings for approval and adoption to the **College Board of Education** for contracts greater than \$250,000.
4. Submits subsequent notification and findings for exemptions from competitive procurement (e.g. sole source) to the **College Board of Education** for contracts of \$250,000 or more.
5. Submits to the **College Board of Education**, each calendar quarter, any records of cost analysis and findings for contracts for services that exceed \$250,000 (excluding Personal Services), where the cost to the college would be less by performing the work in-house but lacks the personnel and resources to do the work and, therefore, contracts it out.

Appeal Procedure

Protester:

1. Provides written notice of any protest of intent to award to **Procurement Services** within five (5) working days, or seven (7) calendar days, whichever is later.

Procurement Services:

1. Reviews protest and contacts the **Protester** to attempt to resolve the protest.
2. Provides written notice of Initial Determination and Findings to the **Protester** within three (3) working days of receipt of the written protest.
3. Advises **Protester** of right to appeal before the **College Board of Education**, if written request is received by **Procurement Services** within five (5) calendar days and the contract is for \$250,000 or more.

Vice President/Chief Financial Officer:

1. Administers protests/appeals for contracts less than \$250,000.

Procurement Services:

1. If appeal is not received, completes contract award.
2. If appeal is received, notifies the **Vice President/Chief Financial Officer** of the **Protester's** decision to appeal.

Vice President/Chief Financial Officer:

1. Schedules the appeal on the **College Board of Education** agenda, and notifies the **Protester** of the time/place of the

board meeting.

- Protester:**
1. Appears before the **College Board of Education** to appeal based on written grounds received in **Procurement Services**.
- College Board of Education:**
1. Makes Final Decision and Order.
- Vice President/Chief Financial Officer:**
1. Notifies the **Protester** in writing of decision made by **College Board of Education**.
- Procurement Services:**
1. Based on the **College Board of Education's** decision, completes contract award or repeats Formal Process if it's in the college's best interest.

June 25, 1985

Adopted College Council

March 17, 2011; July 11, 2017; May 15, 2024

Revised by College Executive Administration

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Revised