

PURCHASING PROCEDURE

Related Board of Trustees Policy: BP 5.2

Approval: May 2012

Revision:

No supplies or materials should be purchased or services obtained without a purchase order (written requisition or E-procurement requisition) or by following the procedures for procurement (credit) card usage. All requisitions and procurement (credit) card usage must have the appropriate employee and supervisory signatures/e-procurement approvals before submission to Financial Services.

Whenever possible, the use of E-procurement to place a purchase requisition is preferred. All E-procurement orders require a “title” which should start with the unit code (general ledger budget code) of the department placing the order. For example, an order from Technology Services might be titled “**Unit 15000: Computers for Science Lab.**”

If E-procurement cannot be used for a particular purchase, complete the [Requisition Form](#) (including appropriate signatures) and send the original to Financial Services for processing.

NOTE: The [Requisition Form Instructions](#) are available for additional information.

The Director of Financial Services and Purchasing and the Vice President of Administrative Services may deny any request for purchasing supplies, materials, or services for any of the following reasons:

- Items/services not considered necessary to the strategic priorities of the college
- Amount to be expended exceeds a unit’s budgeted funds
- Unavailability of college funds to cover the expense requested
- Any purchase request submitted after March 15th (or the Friday before that date if March 15th falls on a weekend)

In emergency situations or due to extenuating circumstances, items costing less than \$25.00 may be purchased without prior approval from Financial Services. This action should not be taken to circumvent using a written requisition or submitting an E-procurement order. (Refer to Petty Cash Procedure.) All purchases of \$25.00 or more require supervisory and Financial Services’ approval **prior** to being made. Reimbursement to the employee depends on strict compliance with the Petty Cash Procedure, including submitting an original receipt attached to the proper reimbursement form.

Equipment items costing over \$1,000 (including tax and freight) can only be purchased via a purchase order. These items must be tagged and inventoried.

For purchases of more than \$5,000, but less than \$10,000, written competition must be sought. The Purchasing Department handles the bidding process; however, departments requesting large purchases should consider the time involved in their expectations of when the goods/services can be received.

All goods and services must be **received** on campus **and paid for** by the end of the fiscal year in order for the funds to be used from the current year’s budget.

Accountability

Violation of the purchasing rules and procedures by employees will be documented by Purchasing and handled in the following manner:

Level One – First Offense: Purchases made by an employee or services acquired without a purchase order or procurement card.

Response: Purchasing will notify the employee by email with a copy to his/her Dean or Division Head and the Vice President of Administrative Services with documentation of the violation and offer suggestions, if any, of how the request could/should have been processed for future reference.

Level Two – Second Offense: Purchases made by an employee or services acquired without a purchase order or procurement card after receiving a previous purchasing violation.

Response: Purchasing will notify by email the Dean of the unit and copy the Vice President of Administrative Services with documentation of the current violation as well as the previous violation. The Dean will be expected to address the issue with the supervisor of the employee who should document the violations as part of the performance review process and work with the employee to ensure all future purchases follow the colleges' policies and procedures.

Level Three – Final Offense: Purchases made by an employee or services acquired without a purchase order or procurement card for which the employee has already received two purchasing violations.

Response: Purchasing will notify by email the Dean and Vice President of the unit and copy the Vice President of Administrative Services with documentation of the current violation and previous two violations. Employee is subject to BP2.9 and is subject to disciplinary action up to and including dismissal.

All requisitions (paper or through e-procurement) should be completed and submitted to Financial Services by March 15th each year. If March 15th falls on a weekend, the requisitions should be submitted to Financial Services by the Friday before that weekend. This purchasing deadline applies to categorical and special funds. The Director of Financial Services and Purchasing as well as the Vice President of Administrative Services may deny any request submitted after the March 15th deadline.

In some cases, emergency expenditures will be approved on a case by case basis.

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