



## **Purchasing Policies and Procedures**

### **A. General**

As set forth in statutes of the State of California, the Board of Trustees of the Yosemite Community College District has the sole authority to purchase materials and services for the District. The Board of Trustees has designated the Director of Purchasing as its agent for the purchase of required materials and services.

The District has empowered only the Purchasing Department to purchase supplies, equipment and services. Purchases made by individuals and departments without authorization of the Purchasing Department will not be paid.

### **B. Bids & Quotes Procedures**

All materials and services having a substantial value shall be purchased through competitive procedures. The following information summarizes the basic types of competitive purchases. The time frames noted do not include delivery, lead times, construction periods, etc.

### **C. Legally Advertised Bids**

The Public Contracts Code requires that all purchases of equipment, materials, and supplies exceeding \$88,300 in value, and all purchases of work to be done exceeding \$15,000 in value, be accomplished through a procedure which includes the following steps:

1. The Purchasing Department requires that the Board of Trustees authorize the legal advertisement for bids for the required purchase.
2. The Purchasing Department advertises for bids for a two week period in a newspaper of general circulation within the District. The Purchasing Department will ensure that the bid specifications adequately describe the materials or services required by the District. Bid specifications will be written in a manner which encourages competitive bidding from all interested responsible suppliers or contractors. The Purchasing Department will consider acceptance of materials or equipment which are equivalent of that specified. The vendor is responsible for providing sufficient data with their bid to make this evaluation possible. Determinations of equivalency will be made by the District as objectively as is possible.

Bid documents will be mailed by the Purchasing Department to suppliers or contractors known to provide the materials or services required. Bid documents are also available to any responsible vendor or contractor who requires an opportunity to submit a bid.

All bids shall be submitted on District Bid forms in accordance with the instructions included therein, and shall be accompanied by all required information, bid deposits, bonds, and certifications. Failure to submit the bid in accordance with these instructions may invalidate the bid.

The Purchasing Department receives and opens sealed bids for the required materials or services. Sealed bids will be received and publically opened by the Director of Purchasing at the time and place specified in the bid documents. Bids received after the bid opening time specified will not be considered and will be returned to the bidder unopened. After opening, all bids shall be available for inspection by interested parties.

The Purchasing Department recommends that the Board of Trustees authorize the award of a Purchase Order to the lowest responsible bidder who meets the District's specifications.

The Board of Trustees authorizes the award of a Purchase Order to the supplier who has submitted the lowest bid which is responsible to the District's specifications.

The Board of Trustees reserves the right to reject any or all bids, or to waive any irregularity or informality in any bid or in the bidding procedures.

The bidding process will take four to six weeks.

#### D. Informal Price Quotations

The Purchasing Department solicits price quotations for the required materials or services from a minimum of three suppliers. Suppliers will be allowed approximately fourteen calendar days to respond to the Request for Quotation; otherwise stated on quotation. The Purchasing Department will award the Purchase Order to the supplier who has submitted the lowest quotation which is responsive to the District's specification. Purchases of this nature will be made from sources which ensure that the District is obtaining maximum value for funds budgets for expenditure, consistent with delivery requirements, departmental overhead expenses, and other factors.

The information Request for Quotation (RFQ) is not a legally advertised bid. Although a due date is noted on the RFQ, a formal bid opening will not be conducted. Quotations will be evaluated as soon as after the due date as workload permits.

Divisions or Departments having urgent purchasing requirements, which may not allow for the above noted processing periods, should contact the Director of Purchasing.

#### E. Special Types of Purchase Orders

##### 1. Open Purchase Orders

With the approval of the Director of Purchasing, Division or Department Budget Managers may request that Open Purchase Orders be established with suppliers for the repetitive purchase of small dollar value supplies or services throughout the school year.

##### 2. Annual Maintenance Agreements

With the approval of the Director of Purchasing, Division or Department Budget Manager may request that Annual Maintenance Agreements be established to provide regular maintenance service for District equipment. Due to the cost involved, Annual Maintenance Agreements should not be established for equipment which requires infrequent maintenance or repair.

##### 3. Change Order (Original Purchase Order)

Change Order Purchase Orders represent a change in one of the following: address, cost or line item from the original Purchase Order. This form must be signed by the Division or Department Budget Manager and the Controller prior to the Purchasing Department making the change in Datatel.

#### F. Requesting Equipment, Supplies, and Services

##### 1. Electronic Requisition – submitted through Datatel

The Electronic Requisition is used to request the purchase of budgeted equipment, supplies, and services. A separate Electronic Requisition should be submitted for different types of purchases (i.e. equipment, services, supplies). In order to assure requisitions are processed in a timely manner, it is essential that the Electronic Requisition include the following information:

- a. A description of the items required, including brand name/make/model information, item number
- b. Size of item required if various sizes are available

- c. Color
- d. Quantity
- e. Information regarding optional services required from the supplier (i.e. assembly, installation, training of personnel, etc.)
- f. Supplier information to include: company name, address, phone & fax number
- g. Shipping charges
- h. Any specific instructions for the supplier

## 2. Electronic Requisition Approval Process

### a. Central Services

- i. Division or Department Budget Manager
- ii. Vice Chancellor of Information Technology (if requisition has IT products)
- iii. Director of Facilities Planning (if requisition is using Capital Outlay or Measure E funds)
- iv. Controller

### b. Modesto Junior College

- i. Division or Department Budget Manager
- ii. Vice President of Administrative Services
- iii. Vice Chancellor of Information Technology (if requisition has IT products)
- iv. Director of Facilities Planning (if requisition is using Capital Outlay or Measure E funds)
- v. Controller

### c. Columbia College

- i. Division or Department Budget Manager
- ii. Vice President of Administrative Services
- iii. Vice Chancellor of Information Technology (if requisition has IT products)
- iv. Director of Facilities Planning (if requisition is using Capital Outlay or Measure E funds)
- v. Controller

## G. Purchasing with Federal Funds

Purchases funded by federal grant funds must adhere to regulations found in Office of Management and Budget (OMB) Circular A-110. Circular A-110 explains administrative requirements for colleges, universities, hospitals, and other non-profit organizations with federally funded grants and agreements. OMB circular A-110 section 40-48 identifies required procurement standards. Detailed requirements may be located at the following file path: <http://www.whitehouse.gov/omb/circulars/a110/a110.html#40>

Purchases made with Federal funds are reviewed for compliance with the Federal Acquisition Regulation (FAR) and OMB Circular A-110. The grant administrators are required to retain all back-up documentation, such as bids, quotes, and cost/price analyses, as well as any other additional information as required by the grant documents, on file for Federal auditors.

The District requires grant administrators to conduct a price or cost analysis for every purchase to ensure a fair and reasonable price. Such analysis is reflected in recorded competitive quotes and proposals. Buyers shall make an effort to use and verify District discounts, check market prices, review past purchase orders for similar items, and demonstrate best business practices.

For grant purchases that exceed the Federal small purchase threshold fixed at CFR 215 Subpart C, 44 (currently \$25,000 or more), the District requires written records reflecting:

- Basis for vendor selection
- Justification letter for lack of competition when competitive bids or offers are not obtained (i.e. single- and sole-source procurements), and
- Basis for award cost or price

#### 1. Overall Procurement Guidelines

- Recipients of federal grant(s) shall avoid purchasing unnecessary items.
- When appropriate, an analysis should be conducted of lease and purchase alternatives to determine which would be the most economical and practical procurement for the Federal grant monies used.

#### 2. Sub-Awards and Contracts – Debarment and Suspension

Sub awards and contracts will not be permitted with parties that are debarred, suspended, or otherwise excluded from or ineligible for participation in Federal assistance programs or activities.

Grant administrators are responsible for checking the System for Award Management (SAM) website prior to the approval of federal sub awards or contracts (to include purchase orders) of any amount. This information shall be documented with the Purchase Order by the Director of Purchasing. Director of Purchasing queries for vendors at the following file path: <https://www.sam.gov/>.

3. Goods/Services Selection Criteria:

- The Director of Purchasing shall obtain a clear and accurate description of the technical requirements for the material, product, or service to be procured. In competitive procurements, such a description shall not contain features which unduly restrict competition.
- Request for Proposals (RFPs) issued to vendors shall contain requirements which the respondent must fulfill and all other factors to be used in evaluating bids or proposals.
- Whenever practicable, RFPs shall contain descriptions of technical requirements in terms of functions to be performed or performance required (i.e. performance specifications), including the range of acceptable characteristics or minimum acceptable standards.
- RFPs shall include the specific features of “brand name or equal” descriptions that respondents are required to meet with such items are included in the solicitation.
- To the extent practicable and economically feasible, grant administrators shall emphasize preference of products and services dimensioned in the metric system of measurement.
- To the extent practicable and economically feasible, grant administrators shall emphasize preference for sustainable products and services that conserve natural resources and protect the environment and are energy efficient.

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**Questions Contact: Howard Coit - Director of Purchasing & Receiving Operations (209)575-6521**