

PURCHASE AND PAYMENT GRID - GENERAL GUIDELINES

GENERAL GUIDELINES - It is the intent to provide users with a set of general guidelines in this comprehensive listing, but it is not an all-inclusive list. There may be times where the circumstances and nature of the purchase require changes or exceptions to these purchasing guidelines.

QUOTATION, BID, AND AUTHORIZATION REQUIREMENTS FOR PURCHASES, CONTRACTS, AND DIRECT PAYS

BUSINESS SERVICES AND ACCOUNTS PAYABLE						
	TYPE OF PURCHASE - NO PURCHASE ORDER REQUIRED	TOTAL AMOUNT OF PURCHASE	QUOTE OR SOLICITATION REQUIREMENTS	BOARD ADMIN. PROCEDURE	PAYMENT DOCUMENTATION	SIGNATURE AUTHORITY FOR PURCHASES, CONTRACTS, AND CHANGES
1.	Procard ~ Frequently needed items and goods. (Excludes capital equipment, technology items over \$100, meals, food, beverages, alcohol, gas for personal vehicles, etc.)	Varies	Not Applicable.	Refer to the Business Services Rules and Procedures for Procard Use for guidelines.	Vendor Invoice; monthly ProCard statement with supervisor approval and compliance with audit review.	Purchasing Authority per Education Code 81656 as delegated by Board of Trustees.
2.	One-time Services or Events ~ Single pay type situations such as rental, repairs, art models, catering services, musicians, fingerprinting, speaking engagements, facilitators, mailings, Flint Center ushers, and printing services.	\$1 - \$999	Depending on nature/circumstances of services rendered, a written agreement may be required.	AP 3143 and AP 3140	Invoice for Services Rendered Form (ISR) <u>and</u> vendor invoice (if available) and W-9; <i>depending on nature/circumstances of services rendered, a written agreement may be required.</i> Refer to FAQ's on Invoice for Services Rendered Form .	As delegated by BOT Refer to the Purchasing Authority Grid .
3.	Other Payment Requests ~ Payments not covered by PO or ISR such as general reimbursements, fees, dues and memberships, registrations to hotel and vendor conferences, telephone, utilities, and materials and supplies under the capitalization threshold per purchase.	Varies	Not covered by PO or Invoice for Services Rendered (ISR).	AP 3140 and AP 3210	Direct Pay Form - vendor invoice or receipt, refer to FAQ'S on Direct Pay Form .	As delegated by BOT Refer to the Purchasing Authority Grid .

PURCHASING SERVICES						
	TYPE OF PURCHASE	TOTAL AMOUNT OF PURCHASE	QUOTE OR SOLICITATION REQUIREMENTS	BOARD ADMIN. PROCEDURE	PURCHASE OR CONTRACT TYPE	SIGNATURE AUTHORITY FOR PURCHASES, CONTRACTS, AND CHANGES
1.	Small Purchase ~ equipment, materials, supplies, repairs and maintenance services ** (Category 1), and misc. biddable services.	\$1 - \$10,000	One documented verbal or written quote OK.	AP 3140	Purchase Order issued by Purchasing Services.	Purchasing Authority per Education Code 81656 as delegated by Board of Trustees.
2.	Informal Quotes ~ equipment, materials, supplies, maintenance services (Category 1) and misc. biddable services.	\$10,001 - \$88,300*	Three written quotes obtained by Purchasing Services by RFQ. Notice posted on PlanetBids.	AP 3140	Purchase Order issued by Purchasing Services.	Purchasing Authority per Education Code 81656 as delegated by Board of Trustees.
3.	Formal Bid ~ equipment, materials, supplies, maintenance services (Category 1) and misc. biddable services, including technology.	More than \$88,300*	Advertised competitive bid per Public Contract Code (PCC) 20651 - 20653.5.	AP 3140	Purchase Order or Contract issued by Purchasing Services after Board of Trustees authorization of award.	Board of Trustees authorizes award or changes by District Purchasing Director.
4.	Independent Contractors/Agreements ~ including professional services. Most services are subject to legally mandated advertised competitive bidding. (NOTE: NOT applicable for Public Projects, Repairs and Maintenance; also see the specific requirements in AP3140 for Public Projects.)	\$1,000 - \$20,000***	•None for specialists such as lawyers or doctors, but must conduct a Request for Qualifications for construction consultants such as architects, engineers, or project managers. •Follow the quote requirements for the type of purchase (see requirements listed for Small Purchase and Informal Quotes.	AP 3143 and AP 3140	PO with Agreement attached.	As delegated by BOT Refer to the Purchasing Authority Grid .

PURCHASING SERVICES - Continued

	TYPE OF PURCHASE	TOTAL AMOUNT OF PURCHASE	QUOTE OR SOLICITATION REQUIREMENTS	BOARD ADMIN. PROCEDURE	PURCHASE OR CONTRACT TYPE	SIGNATURE AUTHORITY FOR PURCHASES, CONTRACTS, AND CHANGES
5.	Public Projects, Repairs and Maintenance (Category 2) ~ facility construction, alteration, renovation, demolition, painting, repairs and maintenance to building structures and equipment affixed to building structures.	\$0 - \$25,000	One documented written quote. Reference PCC 22032.	AP 3140	Purchase Order issued by Purchasing Services.	Sr. Buyer - Special Projects, Director of Purchasing Services, or VC Business Services as delegated by Board of Trustees.
6.	Public Projects, Repairs and Maintenance ~ facility construction, alteration, renovation, demolition, painting, repairs and maintenance to building structures and equipment affixed to building structures.	\$25,000 - \$175,000	Solicitation of written price quotations from licensed contractors via written RFQ by District Purchasing Services. Notice posted on PlanetBids. Reference PCC 22030 - 22045.	AP 3140	Purchase Order issued by Purchasing Services.	Sr. Buyer - Special Projects, Director of Purchasing Services, or VC Business Services as delegated by Board of Trustees.
7.	Public Projects, Repairs and Maintenance ~ facility construction, alteration, renovation, demolition, painting, repairs and maintenance to building structures and equipment affixed to building structures.	More than \$175,000	Formal advertised bids obtained by District Purchasing Services in accordance with PCC 20651 and 22030 - 22045.	AP 3140 and AP 3213	Purchase Order and Agreement issued by Purchasing Services after Board of Trustees authorization of award.	Board of Trustees authorizes award by District Purchasing Director and changes by Executive Director Facilities & Operations.

OTHER SPECIALIZED AREAS

	TYPE OF PURCHASE	TOTAL AMOUNT OF PURCHASE	QUOTE OR SOLICITATION REQUIREMENTS	BOARD ADMIN. PROCEDURE	PURCHASE OR CONTRACT TYPE	PAYMENT DOCUMENTATION	SIGNATURE AUTHORITY FOR PURCHASES, CONTRACTS, AND CHANGES
1.	Other types of contracts such as real estate or financing.	Varies	Legal requirements vary. RFP or bid preferred and notice posted on PlanetBids.	AP 3143	Contracts in a format approved by District Business Services.	Written contract - not applicable.	As delegated by BOT. Refer to the Purchasing Authority Grid .
2.	Textbooks, library books, instructional software, educational films, audiovisual materials, test materials, workbooks, or periodicals for Library Services or resale items by College Bookstores.	Less than \$250,000 or bid threshold for resale items	For textbooks, library books, instructional software, educational films, audiovisual materials, test materials, workbooks, and periodicals, none per Education Code 81651. For resale items, follow Purchasing Services guidelines above.	AP 3140	Verbal or written orders in the form required by each college administration.	Purchase order, receiving document, and vendor invoice.	As delegated by BOT. Refer to the Purchasing Authority Grid .
3.	Perishable foodstuffs for cafeterias and Food Services.	\$15,000 per purchase	None per PCC 20660.	AP 3140	Verbal or written orders in the form required by each college administration.	Vendor invoice with delivery confirmation.	As delegated by BOT. Refer to the Purchasing Authority Grid .

* Bid Threshold as of 1/1/17 is \$88,300

** Repairs and Maintenance can be classified into two categories based upon whether the labor to provide the service is required to be paid at the current prevailing wage rates as defined by California Labor Code.

Category 1 - Non-prevailing wage: Includes, but is not limited to, repairs and maintenance for technology equipment, software applications, freestanding equipment, vehicles, and janitorial cleaning services.

Category 2 - Includes infrastructure systems, building systems equipment, grounds and landscape, cabling, carpeting, painting, and installation of equipment permanently affixed to the building.

*** Cannot be used for Public Projects, Repairs and Maintenance, nor for the purchase of equipment, materials, software, supplies, or misc. biddable services that are subject to legally mandated advertised competitive bid requirements.