



PURCHASING HANDBOOK

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Contracts & Purchasing Services
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OVERVIEW

Welcome to Contracts & Purchasing Services ("C&P") at San Jacinto Community College District ("SJCCD" or "College"). This Purchasing Handbook is designed to give you basic information and training on purchasing policies and procedures. You will learn about the tools and resources available to you when making departmental purchases.

The College is a public entity, and as such, we are accountable to many stakeholders: the taxpayers, the state, funding agencies, and more. When making purchases for the College, it is incumbent upon you to avoid impropriety.

There are three major things you should consider before making any purchase:

USE COLLEGE PURCHASING POWER APPROPRIATELY.

As an employee of SJCCD, you are allowed to make purchases for official business use only. Make sure you know what you are purchasing and why it is needed. If you have questions, check with your supervisor or Contracts & Purchasing Services.

Make every effort to ensure you are getting quality goods at a fair price. This generally means using trusted suppliers and shopping for the best price for the item needed.

Provide courteous, fair, and open competition to all potential suppliers. Retain non-public information in confidence.

AVOID THE APPEARANCE OF FAVORITISM.

Do not accept gifts or gratuities from suppliers, either for business or personal enrichment. This could bring into question the reasons why the supplier was chosen and whether the decision was based on a legitimate business need.

AVOID THE APPEARANCE OF A CONFLICT OF INTEREST.

The College prohibits the purchase, lease, or contracting for services with any employee or near relative who has an employee-supplier relationship. An employee-supplier relationship is defined as:

- An employee, acting alone, proposes for a consideration to rent or sell goods or to provide services to the College, or an employee owns or controls more than 10% interest in any business that proposes for a consideration to rent or sell goods or to provide services to the College; or
- A near relative of an employee, acting alone, proposes for a consideration to rent or sell goods or to provide services to the College, or a near relative of an employee owns or controls more than 10% interest in any business that proposes for a consideration to rent or sell goods or to provide services to the College, and the employee has, in any connection with his or her College employment, any responsibility for, or will be involved in any manner in, the departmental decision to accomplish or approve the transaction.

CONTRACTS & PURCHASING SERVICES CONTACTS

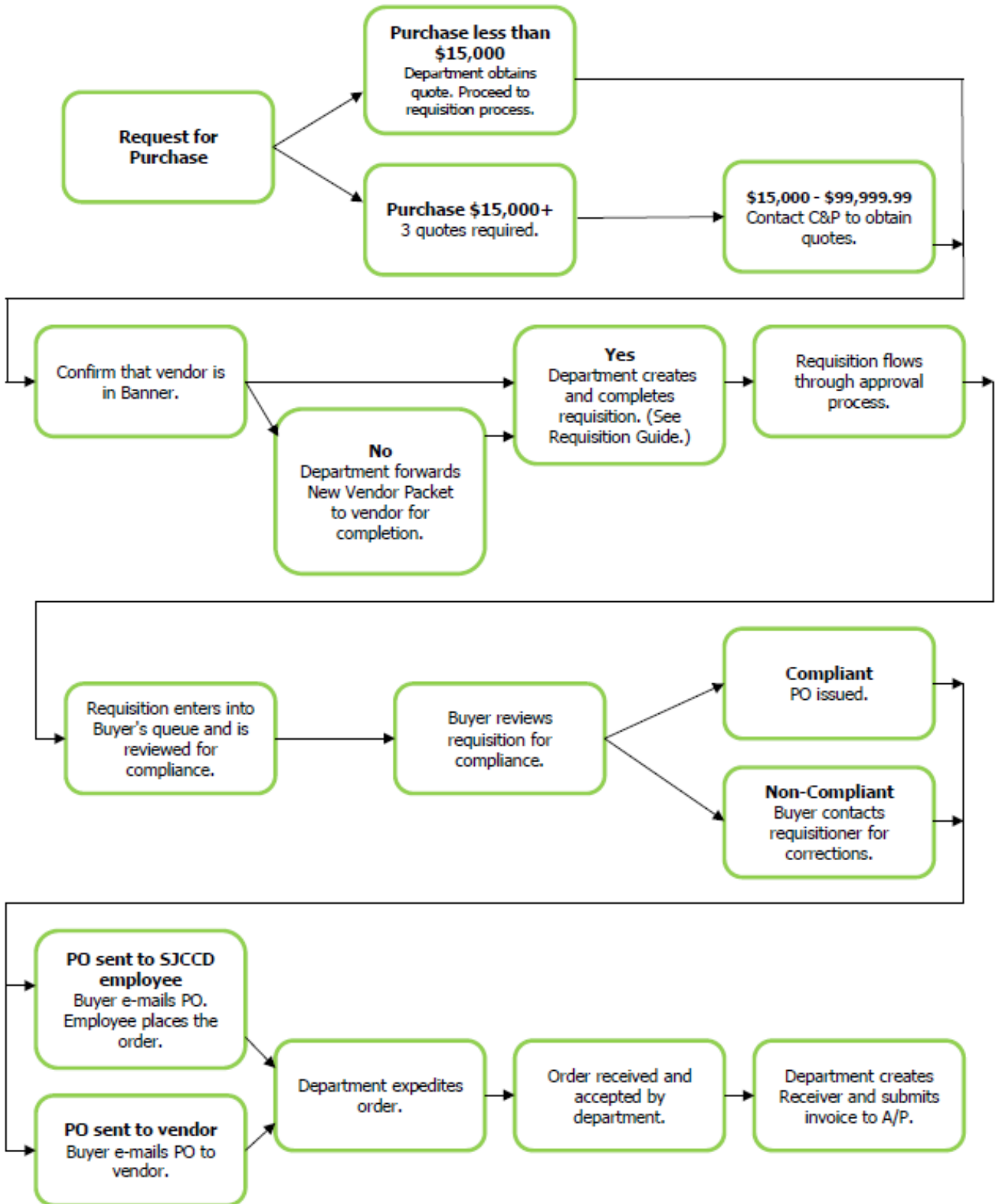
Name	Phone	Title	Responsibilities
Damon Harris	281-998-6103	Chief Procurement Officer	
Angela Russell	281-998-6327	Purchasing Director	
Rhonda Williams	281-998-6348	Contract Administrator	Contract review and state reporting
Genevieve "Genie" Scholes	281-998-6349	Facilities Buyer	Construction, facilities, maintenance
Farrah Khalil	281-998-6326	Senior Buyer	Audit Services, IT Services, Professional and Consulting, Insurance, Banking, Legal Services
Patsy Laredo	281-998-6106	Buyer	Bookstore, Educational Training, Food, Medical, Science, Temporary Staffing, Guest Speakers
Melissa Fuqua	281-998-6378	Buyer	Advertising, Auto, Childcare, Police, Safety, Travel, Technical Education
Kimberly Adams	281-991-2614	Buyer	Athletics, Office Supplies, Library, Furniture, Maintenance Equipment, Printing, Moving Services, Entertainment, Promotional Items and Clothing
Jaclyn Stafford	281-998-6364	Pcard Administrator	Procurement card program
Amy Lopez	281-998-6117	Purchasing Assistant	General questions, copiers, bottled water, supplier record maintenance
Sendhy Arredondo	281-991-2681	Purchasing Assistant	Procurement card internal audit, cell phones, records management and retention, LBB reporting
For general questions, call 281-998-6117 or email contracts.purchasing@sjcd.edu .			

PROCUREMENT ETHICS

1. Demand ethical practices from all participants in the purchasing process.
2. Strive to obtain the maximum value for each dollar of expenditure.
3. Foster a transparent environment by being fair and reasonable in all dealings.
4. Promote positive relationships by providing all competitive suppliers courteous, fair and equal treatment.
5. Make reasonable efforts to negotiate equitable and mutually agreeable settlements of controversies with suppliers.
6. Under no circumstances accept directly or indirectly gifts, gratuities or other things of value that might influence, or appear to influence, purchasing decisions.
7. Avoid involvement in any activity that could be considered a conflict between personal interests and the interests of SJCCD.
8. Know and obey the State of Texas laws and SJCCD policies governing the purchasing function and remain alert to the legal ramifications of purchasing decisions.
9. Retain all nonpublic information in a confidential manner.

PURCHASING PROCESS FLOW

To be used when a contracted supplier is not required.



GENERAL PROCESSES AND PROCEDURES

ABBREVIATIONS COMMONLY USED

C&P	Contracts & Purchasing Services
CSP	Competitive Sealed Proposal
IFB	Invitation For Bids
PO	Purchase Order
PR	Purchase Request; document used for Board approval
PRS	Number assigned to artwork through the Marketing department
REQ	Requisition
RFP	Request For Proposals
RFS	Request For Facilities Services
RFQ	Request For Qualifications

BOARD OF TRUSTEES APPROVAL (commonly referred to as Board Approval)

The Board of Trustees must approve purchases greater than \$100,000. "Purchase" is defined as goods, services, and/or projects within a fiscal year's 12-month period using several requisitions during that time or one requisition and from one or many suppliers. Purchases over \$100,000 must utilize one of the following forms of procurement: formal solicitation, sole source, or cooperative contract.

CLOSING PURCHASE ORDERS

Mark "final payment" on the last invoice for payment sent to Accounts Payable. If a PO is not closed by A/P, e-mail the appropriate Buyer with the PO number to request it be closed. Only submit a request to close a PO after confirming all invoices have been paid and checks have been issued.

COMMODITY CODES

Commodity codes are required to identify the category of items purchased through Banner. Each Buyer is assigned a set of commodity codes. The most current commodity code list can be found on The Exchange.

<https://sjcdedu.sharepoint.com/sites/InternalPurchasing/SitePages/Purchasing-Resources>

CONTRACTS

All contracts must be routed through C&P for review and approval. All contracts and agreements that commit College funds shall be signed by the Chancellor or her designee. The Chancellor's designee is the Vice Chancellor of Fiscal Affairs (VCFA). Contracts are reviewed in the order they are received.

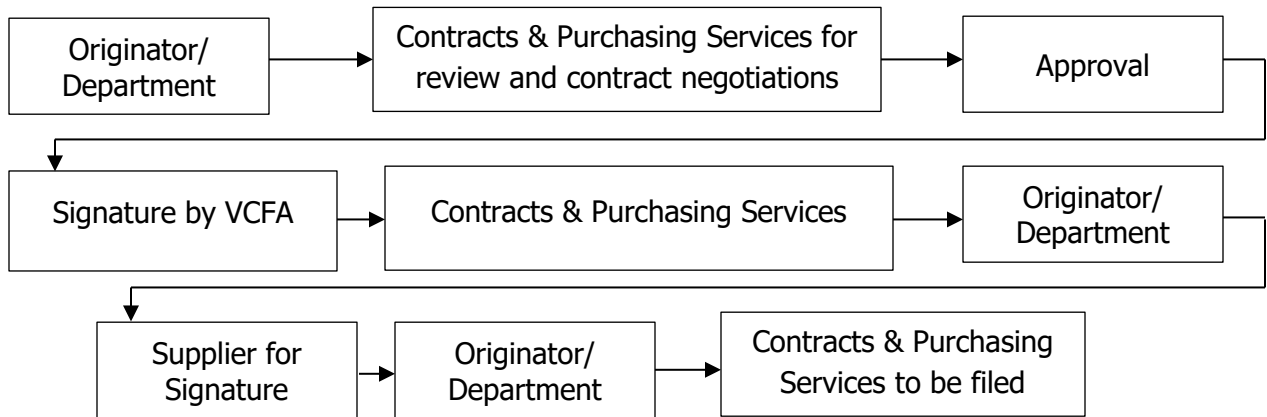
A Contract Intake Form (CIF) is required when submitting any contract documents to C&P for review and signature. The most current CIF can be found on The Exchange.

<https://sjcdedu.sharepoint.com/sites/InternalPurchasing/SitePages/Contracted-Services>

Contracts and agreements are broad terms frequently used to cover a variety of different types of agreements established by C&P, including price schedules and fixed price agreements. These agreements are written contracts with a specific supplier for specified products or services for a designated period.

The Texas Education Code requires the College to issue solicitations for commodities where the College spends over \$100,000 district-wide over a fiscal year, 12-month period.

Contract Flow:



COOPERATIVE (CO-OP) PURCHASING AGENCIES

A purchasing cooperative is a type of cooperative arrangement that aggregates demand to obtain lower prices from selected suppliers. Co-op agencies are organizations independent of the College. Co-op programs allow government agencies to utilize contracts that were competitively bid. Even though coop contracts fulfill competitive bidding requirements, multiple quotes may still need to be obtained in order to demonstrate best value.

The College utilizes several co-op programs. This list is not all inclusive:

- Educational & Institutional Cooperative Purchasing (E&I)
- First Choice Cooperative (FCC)
- Choice Partners
- Houston-Galveston Area Council (H-GAC)
- Sourcewell
- OMNIA Partners
- Provista
- Purchasing Solutions Alliance (PSA)
- State of Texas Cooperative Purchasing Program
- Tarrant County Cooperative Purchasing Program
- Texas Association of School Boards (TASB) BuyBoard
- Texas Department of Information Resources (DIR)
- Texas Interlocal Purchasing System (TIPS/TAPS)
- Texas Procurement and Support Services (TPASS)
- Texas State Travel Management Program (TSTMP)
- Region 2 Education Service Center (ESC)
- Region 4 Education Service Center (ESC)
- Region 5 Education Service Center (ESC)
- Region 8 Education Service Center (ESC)
- Region 19 Education Service Center (ESC)
- Texas Investment Provider Selection Committee (TIPSC)
- U.S. General Services Administration (GSA), *(limited use only)*

COPIERS

The College leases all new copiers. The copier lease request form must be submitted to request a new copier.

<https://sjcdedu.sharepoint.com/sites/InternalPurchasing/SitePages/Contracted-Services>

DOCUMENT TEXT FOR REQUISITIONS IN BANNER (FOAPOXT)

1. Required Information

Every requisition must include the following information whether it is in Document Text or the Commodity/Accounting Screen line item area.

- **Who?** Who provided the quote and from whom are we procuring the goods or services? Who is the SJCCD contact for the order?
- **What?** Clearly state what is being procured. If this is the only communication between SJCCD and the supplier, will the supplier know what goods or services to provide?
- **Where?** Where is the service to be performed or where are the goods to be delivered and to whom?
- **When?** When is the product to be delivered or service to begin and/or end?
- **Why?** What is the purpose of purchase, ex. special program, supplies, repair, new purchase, etc.?
- **How?** What is the Method of Procurement for this purchase?

2. Purchase Order (PO) Distribution

List in Document Text: Where do the Buyers need to send the PO? If to an SJCCD employee, only the employee's name needs to be listed. If to an external source, an e-mail address needs to be included.

Example text: Send PO to [SJCCD employee name or e-mail address], cc. [SJCCD employee name, e-mail address].

3. Purchase Type

• Goods

Each line item must include a complete description, including model and descriptive name, quantity, and unit price (in Commodity/Accounting Screen of requisition).

• Services

Must include a complete description of the scope of services to be performed. What are the deliverables? Include the duration of the term, if applicable. List additional details in Document Text as needed.

4. Standing Purchase Orders

Delivery date must be entered as last day of fiscal year (8/31/XX).

Comments (box under Delivery Date) must state: Standing PO

Document text must include:

- [Description of items] for [xxxx] Department on [xxxx] Campus.
- PO is valid through 8/31/XX or until funds are depleted.
- Amount not to exceed \$[requisition/PO amount].
- Authorized users: [List the names of those authorized to place orders using this PO.]
- Method of Procurement and Board Approval Date (if applicable)

PROCUREMENT METHODS

Any requisition or purchase **\$15,000 and over** will **not** be processed without one of the following methods documented. "Purchase" is the procurement of goods and/or services during a 12-month period utilizing multiple requisitions or only one requisition. Separation of purchases into multiple requisitions to avoid procurement code and procedures is prohibited. In addition to the information required above, you must include one of the following in *Document Text*:

1. Quotes

\$14,999.99 or less

One quote must be obtained.

\$15,000 - \$99,999.99

Three written quotes must be obtained and on file in C&P. A quote number will be assigned by C&P and must be listed in Document Text.

\$100,000+

Contact C&P. A formal solicitation is required.

2. Solicitation Contracts over \$100,000 (RFP, Bid, RFQ)

Contact C&P to initiate a new solicitation request.

For existing solicitation contracts, Document Text must include the following:

- RFP/Bid/RFQ #[xx-xx]
- Board approved date (if applicable over \$100k)

3. Cooperative (Co-Op) Contracts

- Vendor's quote must include the cooperative contract name and number
- Quotes for co-op purchases over \$15,000 are required to be on file in Purchasing
- Document Text must include the following:
 - Vendor quote number and/or date of quote, vendor representative name/email
 - Cooperative Contract Number
 - Board Approved Date, if needed
 - Most co-op contracts are approved each August for the upcoming budget year. Only contracts with which the College spends over \$100,000 annually will be named individually for the Board's approval.
 - Send PO to [name of cooperative] at [e-mail address], such as:
 - BuyBoard: buyboard@tasb.org
 - TIPS: tipspo@tips-usa.com

4. Sole Source

- Sole source #[xxxx]
 - Assigned by C&P if Sole Source Form is approved
 - Not all Sole Source requests may be approved; contact C&P for details.
- Board approved date (if applicable)

EMERGENCY PURCHASES

The College is not required to bid or quote goods or services when an emergency affecting the health or safety of occupants of college property requires the immediate delivery of the goods or the performance of the service. The failure to plan does **not** constitute an emergency. All emergency purchases must be reported to C&P as soon as reasonably possible and made in accordance with the policy and procedures on bidding.

FACILITIES – REQUEST FOR FACILITIES SERVICES (RFS)

The RFS form is required for purchasing new furniture totaling \$2,000 or more, renovating, constructing and/or altering any part of the College's infrastructure or facilities. The RFS form can be found on The Exchange.

<https://sjcdedu.sharepoint.com/sites/InternalFacilitiesOperations>

FORMS

Important C&P forms include, but are not limited to, the following list and can be found on The Exchange: <https://sjcdedu.sharepoint.com/sites/InternalPurchasing>

- Commodity code list
- Board approval summary
- Requisition guide
- Copier lease form
- New vendor packet
- Pcard procedures
- Tax exemption forms

IT PURCHASES

An IT approval number must be obtained for all software purchases and purchase of non-standard IT items. To request an IT approval number, complete a Solution Intake Form (SIF) available at <https://www.sanjacits.org/software-approval> and include the quote or item name/number needing approval. The IT approval number must be included in document text when a requisition is entered.

INSURANCE REQUIREMENTS

To protect the College's interests, all suppliers who provide goods or services to the College and will physically be on campus must have a Certificate of Insurance on file with C&P. If a current certificate is not on file, C&P may ask for your assistance in obtaining this document.

PCARDS

Pcard applications can be located by logging onto The Exchange.

<https://sjcdedu.sharepoint.com/sites/InternalPurchasing/SitePages/Pcard-Information>

- Pcards are issued to full-time SJCCD employees only.
- The employee's name will be embossed on the card.
- Pcards are not transferrable between individuals.
- Each Cardholder will be assigned to an Approving Authority.
- Approving Authority may have authority for more than one department.
- All Approving Authorities work in conjunction with the Pcard Administrator.
- Employee's Chancellor, Vice President/Vice Chancellor must approve the request for a card.
- Cardholders make purchases (using established guidelines) and allocate charges monthly, using JP Morgan Chase's website.
- Cardholder matches receipts to online transactions, runs report, and forwards to Approving Authority for review and approval.
- Cardholder and Budget Control will have the responsibility of allocating/overriding account codes of a transaction and approving bills.
- JP Morgan Chase generates one electronic invoice for SJCCD and the Pcard Administrator will notify cardholders by email each month at the end of the billing cycle (approximately the 5th of the month).
- An ACH payment is made to JP Morgan Chase within 3 days after the end of the billing cycle.

PROFESSIONAL SERVICES

Professional services are exempt from bidding when spending operational funds (not federal). The following are considered professional services:

- Architect
- Attorney
- Land Surveying
- Medicine
- Optometry
- Professional Engineering
- Fiscal Agent
- Financial Consultant
- Real Estate Appraising
- Professional Nursing
- Accounting
- Technology Consultant
- Forensic Science

PURCHASE AMOUNT THRESHOLDS

\$0 - \$14,999.99	One (1) quote required
\$15,000 - \$99,999.99	Three (3) quotes required and on file in C&P SJC Quote # will be issued by C&P
\$25,000+ (public work)	Payment bond required
\$100,000+	Formal solicitation required
\$100,00+	Board approval required
\$100,000+ (public work)	Performance bond required

“Purchase” is defined as goods, services, and/or projects requested during a 12-month period using several requisitions **or** one requisition.

PURCHASE ORDERS

An approved PO must be issued before an order is placed for goods or services. You should use your copy of the PO to place the order as this is the College’s contract to pay for the purchase. Without an approved PO, you could personally be liable for the purchase.

QUOTE THRESHOLDS

Up to \$14,999.99 per purchase – One (1) quote required.

\$15,000 - \$99,999.99 per purchase – Three (3) written quotes must be obtained and on file in C&P. A quote number will be assigned by C&P.

“Purchase” is defined as goods, services, and/or projects requested during a 12-month period using several requisitions **or** one requisition.

- Purchases up to \$14,999.99
Purchases up to \$14,999.99 are delegated to the departments if a contract has not been previously established for the commodity. One quote is required from the department’s supplier of choice.
- Purchases \$15,000 - \$99,999.99
Purchases \$15,000 - \$99,999.99 require three quotes if a contract has not been previously established for the commodity including a co-op contract. C&P or departments may obtain these quotes. C&P will assign a quote number and quotes will be kept on file. The quote numbers must be noted in document text (FOAPOXT) of requisitions.
- Purchases \$100,000 and over
Purchases \$100,000 and over require a formal solicitation if a contract has not been previously established for the commodity including a co-op contract. This process usually takes at a minimum 2-4 months. Purchases over \$100,000 require approval by the Board of Trustees.

RESPONSIBILITIES OF THOSE ENTERING REQUISITIONS

The person who completes the requisition has certain responsibilities before the requisition is completed and routed for approval. He/she must ensure the following:

- Requisition orders reflect the appropriate budget account. Contact the Budget Control with account questions at x 6148.
- Ensure the ship-to location is the correct campus address.
- Properly identify the supplier. Please note there may be several addresses for a particular supplier. This usually occurs because a supplier has more than one division where orders may be placed or different payment remittance addresses.
- Accurate and complete description of the goods or services being ordered including item number, per item cost, applicable discount, model numbers, etc.
- Shipping and handling costs are to be included when necessary. In all instances, actual shipping costs must be included on the requisition when determinable. Estimated shipping and handling costs are to be added to all requisition orders when actual costs cannot be determined. Shipping and handling must be denoted as a separate line item using the same commodity code as the items requested.
- Use the correct Fund, Org, Account, Project (FOAP) codes.
- Include contract information, sole source number, co-op contract information, or quote information, if applicable.
- Ensure a supplier packet is completed and returned if a supplier cannot be found in Banner.
- Place order using PO with suppliers.
- Expedite and receive orders.

REQUISITIONS - APPROVALS

Use FOIDOCH to view the status of a requisition.

No status – Has not been completed by requisitioner

C – Completed by the requisitioner and in the approval process

A – Approved by all in the approval process and in C&P's queue

X – Cancelled

Use the following Banner forms to view requisition approvals.

FOIAPPH – shows past approvals and the date of an approval

FOAAINP – shows what approvals are still needed and the available bypass approvers

REQUISITIONS - COPYING

When copying requisitions, review past POs before completing the copied requisition.

- Once a requisition is completed, it cannot be changed. When additions or changes need to be made to commodity codes, document text, line items, etc. on an approved requisition, they are made on the PO. Changes are not reflected on the related requisition.
- Use FOIDOCH to see an old PO. Enter the requisition number of the one you want to copy and the associated PO can be viewed.

REQUISITIONS – DENYING/CANCELING

- Once a requisition has been completed, changes can no longer be made without denying the document and setting it back to incomplete. This can be done any time before the final approval is obtained. Use the Document by User Form (FOADOCU) to deny it.
- Once a requisition has completed the approval process, it can no longer be denied or disapproved. Send a request to the Buyer to have the requisition canceled. A new requisition will need to be created, if necessary.

REQUISITIONS - PROCESS

Purchasing requisitions are created by departments and are subject to an approval process based on organization (org) codes and the amount of the purchase. All purchasing documents have automatic routing in Banner. Once all the necessary approvals have been secured, the requisition populates in a Buyer's queue based on the commodity codes used. The Buyers will review requisitions for compliance with laws, policies, and procedures.

SOLE SOURCE PURCHASE

A "sole source" purchase means only one supplier, to the best of the College's knowledge, based upon thorough research, is capable of delivering the required products or services.

A sole source purchase **IS**, per Section 44.031 of the Texas Education Code:

- an item for which competition is precluded because of the existence of a patent, copyright, secret process, or monopoly;
- a film, manuscript, or book;
- a utility service, including electricity, gas, or water; and
- a captive replacement part or component for equipment.

A sole source purchase **IS NOT**:

- an item from a supplier because we really, really like that supplier and they are our friend;
- an item we want to buy because it is the kind we have always purchased in the past;
- a group of items that is conveniently packaged but could be procured separately from multiple sources;
- an item from a supplier who is located nearby and is convenient; or
- an item that is patented but has acceptable substitutes.

Example: Nike athletic shoes are patent protected, but there are other brands such as Adidas, New Balance, etc. who also manufacture athletic shoes. Brand specificity is not considered justification for a sole source purchase.

If you are requesting a sole source purchase, you must submit the following to C&P:

- A completed Justification for Sole Source Purchase Requirements form with all required signatures.

The Justification for Sole Source Purchase Requirements form can be found on The Exchange.

<https://sjcdedu.sharepoint.com/sites/InternalPurchasing/SitePages/Purchasing-Resources>

SOLICITATIONS - PROCESS

The formal solicitation process usually takes about 2-4 months from start to finish. Specifications must be written and advertised in the newspaper. Once sealed bids or proposals are received, a formal opening must take place. The results of the opening must be reviewed and a recommendation of award presented to and voted upon by the Board of Trustees at a regularly scheduled meeting.

SOLICITATIONS - THRESHOLD

The solicitation threshold is \$100,000. This means any specific item, class of items and/or services of a similar nature, purchased by the College totaling more than \$100,000 for the entire fiscal year must be competitively bid. This restriction is for the entire district and not by location or departments.

You may not circumvent the law by splitting purchases into two or more purchase orders which, individually come to under the \$100,000 solicitation threshold.

TAX EXEMPT ENTITY

The College is exempt from paying Texas sales tax and Texas hotel occupancy tax. Carry these forms with you when making any purchases or checking into a hotel in Texas. Tax exemption forms can be found on The Exchange.

<https://sjcdedu.sharepoint.com/sites/InternalPurchasing/SitePages/Purchasing-Resources>

UNAUTHORIZED PURCHASES

An approved PO must be issued before an order is placed for goods or services. You should use your copy of the PO to place the order as this is the College's contract to pay for the purchase. Without an approved PO, you could personally be liable for the purchase. See the policies below:

Unauthorized Purchases (After the Fact Transactions)

Employees who purchase goods and/or services before proper authorization has been obtained assume complete responsibility for the purchase and may be held personally liable for all costs and any damages associated with the unauthorized purchase. This personal liability includes paying for the purchase with personal funds or personally reimbursing the College for any expenses incurred. Any employee who places an order for goods and /or services without following the approved procurement methods violates the College's purchasing procedures. Employees, who generate financial liability for the College without being authorized to do so, will be subject to disciplinary action, including suspension or termination.

SUPPLIERS

Purchase orders can only be processed for suppliers set up in Banner. Use FTIIDEN to locate suppliers. Use multiple wildcard symbols (%), lowercase and uppercase letters. If you cannot locate a supplier in Banner after trying several different search options, contact C&P for assistance. If the supplier cannot be found in Banner, forward the New Vendor Packet to the prospective supplier.

The Purchasing Assistant in C&P is the contact for supplier maintenance. This includes setting up new suppliers, making changes to old suppliers, marking employees as suppliers for reimbursements, activating inactive suppliers, etc. The Purchasing Assistant can be reached at x6117 or contracts.purchasing@sjcd.edu. The most current vendor packet can be found on The Exchange.

<https://sjcdedu.sharepoint.com/sites/InternalPurchasing/SitePages/Purchasing-Resources>

ON-SITE CONTRACTOR IDENTIFICATION REQUIREMENTS

All contractors, subcontractors or company representatives performing work at any college property or facility shall wear a clearly visible name tag, badge, embroidered or labelled uniform shirt, or other personal or company identification at all times. Failure to comply with this requirement could result in removal from the campus until corrected.