



PURCHASING MADE SIMPLE HANDBOOK

WELCOME to the world of Purchasing! Every day, we need to buy goods and services to help us do our jobs at Mt. SAC. This handbook was created to help understand the basic rules of purchasing here at Mt. San Antonio College.

OUR BUSINESS ETHICS

Since Mt. SAC is a state-funded institution, there are several required procurement procedures and processes that must be adhered to by both the College and prospective vendors who want to provide goods and services. Under state law, the Mt. SAC Board of Trustees has the ultimate responsibility for all purchases and contracts. The College's purchasing philosophy is to maintain professional relationships with all vendors.

Vendors are free to advertise and contact our various departments directly. However, vendors promotional efforts should not include gifts, favors, or any form of personal gratuities to any College personnel. We are equally committed to the principle of inclusive opportunity and welcome the participation of all qualified businesses, including those owned and operated by women, minority, and other underrepresented groups.

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PURCHASING STAFF

Our team is here to help, but each is an expert in certain areas. Check out the “Area of Responsibility” below:

Name	Title	Phone	Area of Responsibility
Angelic Davis	Director, Purchasing, Printing, and Mail Services	(909) 274- 5512	Manages Purchasing, Printing, and Mail Services.
Rondell Schroeder	Procurement Specialist	(909) 274- 5511	Purchase of auto/trucks, modular buildings and property leases, legal advertisements, informal/formal construction bids for projects greater than \$45,000, p-card functions, hazmat testing/inspection services, and formal Requests for Proposals (RFP) for all commodities and services.
Tiffany Chen	Procurement Specialist	(909) 274- 5514	Purchase of equipment, supplies, and services for audio visual, informal/formal construction bids for projects greater than \$45,000, Requests for Proposals (RFP), p-card functions, architect/engineering services, legal advertisements, and Maintenance >\$25,000.
April Landry	Senior Buyer	(909) 274- 5510	Purchase of appliances, air conditioning (instructional), aeronautics, catering/food, copiers & scantrons, fuel, furniture, fees (legal/hotel, etc.), independent contractors, leases/rentals, subscriptions/memberships (including Amazon), and transportation services (buses/charters/rentals).
Sandi Horn	Buyer	(909) 274- 5509	Purchase of instructional equipment and supplies for agriculture, architecture & design, athletics, biology, chemistry, custodial, drafting, earth sciences, fire tech, health services, manufacturing/welding, math, photography, physics, Planetarium, radiology, respiratory therapy, safety/security, electronics, and Construction/Maintenance <\$24,999.
Connie Madarang	Buyer	(909) 274- 5521	Purchase of office equipment/supplies, advertising/marketing, art, books/videos/DVDs, business cards, child development, communications, computer hardware/software, insurance, laundry services, mailing, music, parking, printing, signs/banners, trophies/awards and theater.

RULES TO REMEMBER

Because we use government money to pay for everything we buy, we are subject to federal and state regulations that govern what and how we do our buying.

1. Under law, our **Board of Trustees has the sole authority** for all purchases – and, with few exceptions, it has delegated that authority to Purchasing.
2. **Unauthorized Purchases.** Employees are not allowed to place an order with a vendor and send a “confirming” requisition to Purchasing. **Employees can be personally responsible for paying a vendor** if an employee commits the College to any purchase or service without going through Purchasing.
3. **Conflict of Interest.** The College is not allowed to purchase from any company in which an employee has direct or indirect ownership. It is considered a conflict of interest if a College employee will financially benefit in any way.
4. **Bid Splitting.** It is not allowed to split up big orders into smaller ones to avoid bid thresholds (see threshold table in The Basic Process section).
 - In addition to being illegal, the Accounting Department or the auditor could stop payment to the vendor – which is not fair to the vendor since they contracted with us in good faith.
5. **Deposits** are allowed only after receiving prior approval from the Board of Trustees.
6. **Lottery Funds** may only be used to buy instructional books, supplies and software but cannot be used to purchase equipment.
7. **Gift Purchases** are not allowed with District funds.
8. **Alcohol** purchases are never allowed except for some instructional laboratories.
9. **Invoices** should be sent directly from the vendor to Accounts Payable and payment warrants will be mailed directly to the vendor.

These rules help define **Purchasing’s role** in the Mt. SAC organization. Our mission is to support the educational process by:

- Purchase what the campus wants when campus needs it
- Give the campus the best value for the money spent
- Making sure the District purchases are done legally and ethically
- Maximizing competition from vendors

THE BASIC ORDER PROCESS

The basic purchasing process is as follows, no matter the size of an order:

1. Identify an item/service needed and obtain a quote from Vendor.
2. Verify department budget has sufficient funds in the account to pay for the purchase. If sufficient funds are not available, initiate an appropriation transfer and track it through Banner before proceeding to the next step.
3. Create and submit a requisition in Banner and provide “backup” in OnBase.
4. Acquire approvals by tracking the Banner requisition status through approvals, contacting approvers as needed.
5. Purchasing creates the Purchase Order, places the order with vendor.
6. Warehouse receives goods and delivers to designated area.
7. Orders must be checked and received on the delivery slip. Manager signs the vendor invoice accepting delivery of and authorizing payment for those items.
8. Accounts Payable pays the invoice and disburses the check to vendor.

HOW TO CREATE A REQUISITION

Requisitions are completed via [Banner Finance](#). Banner is the main platform for ordering. Requestor Training and an approved Banner Request Form are required to gain access to Banner.

Once training is complete, orders can be submitted via electronic request. When completing a requisition be sure to:

1. Include the date of when order is needed
2. Ensure that all required Approvals for department/division are obtained. Keep in mind the following:
 - All orders over \$5,000 – Vice President
 - All computer/technology-related orders over \$200 – IT Department
3. If a price quote is received, list the sales rep and the date in the Document Text.
4. For items requiring Board approval, include the Board approval date in the document text.
5. **Always** use the correct Commodity Code, **then** list additional information in the following order: manufacturer, make/model, size, color, vendor’s catalog no., and/or period of service. For equipment purchases, reference the “[Banner Requisition Guide](#)”.
6. A Purchase Order is a contract with the vendor. Any changes to that contract must be issued by Purchasing in writing in the form of a Change Order via email at purchasing@mtsac.edu.

WHAT IS “BACK-UP”? ...

Backup is required documentation that is connected to a requisition request. All Backup is stored in the campus’s centralized information platform called OnBase. Backup can include quote, board approval, contract, justification form, or any other supporting documents.

Proof of competitive pricing is **required** for all purchases over \$10,000 (including labor, taxes, and shipping). To show proof use our [“Quote Summary and Justification”](#) form.

In the chart below, the columns headed **Supplies & Equipment** and **Services** apply to all departments, while the **Construction Contractor Services** column applies only to the Facilities Planning and Management Department.

Supplies & Equipment	Services	Construction Contractor Services	Required Documentation
Under \$10,000	N/A	Under \$25,000	Written quote or a vendor price list.
\$10,000 - \$96,699	Up to \$96,700	\$25,000 - \$59,999	Three (3) written quotes on vendors’ letterhead or Justification form. <u>Services:</u> Contract Agreement and Board Approval for all orders. <u>Construction:</u> A <i>Field Service Agreement</i> for all orders and <i>Payment/Performance Bonds</i> for all orders over \$25,000.
N/A	N/A	\$60,000- \$199,999	Informal bid process: Specifications prepared, notice for informal bids issued, evaluation and selection of lowest responsive & responsible bid, then contract and purchase order issued.
\$96,700* or more	\$96,700* or more	\$200,000 or more	Formal bid process: Advertising placed calling for sealed bids, formal bid issued, evaluation and Board approval of lowest responsive & responsible bid, then contract and purchase order issued.

* Each year, the State may adjust the bid limit amount.

Formal bidding can take 2 to 3 months. It is recommended to contact Purchasing immediately once an item or service is more than the formal bid limit.

WAREHOUSE

Purchasing and Warehouse staff work together to process orders. Review contact information below:

Name	Title	Phone
Ken Bohan	Director, Maintenance and Operations	(909) 274-5512
Steven Green	Coordinator, Warehouse	(909) 274-5800
Hector Gonzalez	Warehouse Worker I	(909) 274-4870
Briam Ruiz	Warehouse Worker I	(909) 274-4870
Susan Gutierrez	Warehouse Worker II	(909) 274-4870

Deliveries

Per Board Policy 6330, all goods shall be shipped to the Warehouse, where items are checked against a purchase order, and then delivered to requested department's scheduled delivery day. The following are exceptions:

Direct Delivery: Sometimes large items – like furniture or copiers – may be delivered directly to a department from the vendor.

- Verify order, sign, and date the Packing Slip and **forward to the Warehouse.**
- If there is an order discrepancy, do not sign off on the delivery and contact Purchasing immediately.

College Pick-ups (“Will Call”): Occasionally, employees may need to pick up an order directly from the vendor.

- Note “College Pick-up” on requisition.
- After item(s) are picked up, have a manager sign an itemized receipt, then email to **Accounts Payable**, accountspayable@mtsac.edu.

Typical Delivery Schedule

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
1 Art Complex 2 Performing Art 3 Gym 4 Administration 6 LTC	7 Science 8 Campus Café 10 Founders Hall 11 Science 9A-D Student Svc 9E -Student Success Ctr. 67 A&B Health 45 Athletics 742 Stadium	12 Ag Sciences 12A Foundation 13 Design Tech 23 IT 77 BTC 78 BTC 79 BTC 16E – Equity Ctr 9F 9G	26A, B & D 27 PE/Wellness 28 Tech.& Health 29 Central Plant 60 Science Lab 69 AIRC/Weld	40 Comm. Ed. 46 PE Offices Hort. Unit 30 35 47 Maintenance 61 Natural Sc./ Math 66 Language Ctr 70 CDC 73 CDC

Note: Delivery Schedules are subject to change due to facilities relocations.

The Warehouse welcomes in-person pickups between 8:00 am – 3:30 pm, if a requestor cannot wait for their scheduled delivery, contact the Warehouse at Ext. 4870. Be ready to provide a purchase order number.

Overnight / Next Day Delivery

If a package is shipped overnight or next day to the Warehouse, it is delivered to the listed person on the same day it is received.

Late or No Delivery

Most vendors ship within 2 – 10 days after they receive an order. Depending on where they are shipping from, it could take another 2 – 10 days to get here.

Once Purchasing completes an order, requestors will receive a PDF copy confirming purchase order. If item(s) are not received within 30 days, follow-up by emailing purchasing at purchasing@mtsac.edu. Include requisition or purchasing number in the subject of email.

Returns

Once order is delivered, sometimes there is a discrepancy, or items are damaged. If item(s) need to be returned, **call the Warehouse** at Ext. 4870.

- Be prepared to provide a brief description of what is incorrect with order
- Provide requisition and/or purchasing order number

Stores Stock

The Warehouse stocks basic office, classroom, paper, and custodial supplies for use by the entire campus at no charge to department's budget.

- Requests can be made on the Mt. SAC website under the [Administrative Forms](#) page, select "Warehouse" button.
- Orders will be delivered on next scheduled delivery day.
- Please order on an as-needed basis, stockpiling large quantities is not permitted.

Fixed Assets

Fixed Assets refer to every piece of equipment and furniture owned by the College. For the most part, only items costing more than \$500 are tagged by the Warehouse and tracked by Purchasing to keep accurate records about the equipment and furniture owned by the College

Requirements:

- Notify the Warehouse that item is a Direct Delivery or a Will Call.
- Review and update inventory records, Purchasing may request updated inventory annually
- The "[Banner User Guide](#)" provides more information about the process of acquiring fixed assets using Banner.

Surplus

Any equipment or furniture no longer need, or that is broken beyond repair, must be properly disposed. After determining there is no other need for the item on campus, the College uses three ways to dispose of surplus items:

- Donation to another educational institution or non-profit agency.
- Bulk sales through a liquidator auction firm.
- Online Auction through a liquidator auction firm.

Requirements:

- Tag item(s) if it is still working.
- Tag item(s) if anyone is interested in having it donated.
- **Donations** require a letter from the interested party confirming their non-profit status as well as Board approval. Contact Purchasing for further information.
- Submit an online work order using “School Dude” for the Warehouse to pick up item(s). Department Admins have access to submit a request.

Relocation Services

The Warehouse staff provides limited relocation services for the following:

- Moving furniture/equipment in a single office or classroom
- Setting up furniture for ACCESS students each semester
- Removing surplus equipment and furniture to the Warehouse for disposal

To schedule a move or removal by Warehouse staff, please submit a work order via “School Dude” online system.

Using School Dude (Department Admins only)

Recently hired admins can request a School Dude account via Facilities at ext. 4850.

1. Access School Dude: Go to login.schooldude.com and log in with name and password.
2. Complete all required fields in Step 1 and 2.
3. At Step 3, click on **Warehouse**.
4. Complete remaining Steps 4-8 and click submit.

The Warehouse will contact via e-mail or phone to set up a time for the work to be done. Moves are limited to a single classroom or office. Relocating multiple rooms and/or buildings is done by professional movers. Contact our **Facilities Department** at **Ext. 4850** to schedule a big move.

SPECIAL CIRCUMSTANCES

Much of what we buy follows normal guidelines, but there are a few special situations that require additional attention.

Emergencies

An emergency is defined as:

- a sudden, unforeseen event that disrupts classroom activity
- an unplanned condition that could pose a risk to persons or property
- ***Lack of planning is NOT an emergency.***

Contact Purchasing Department, ext. 4245 or by email, purchasing@mtsac.edu. Be prepared to explain the nature of the emergency.

Equipment Repairs

If office equipment breaks down, review the table below. Be prepared to give the following information: Make, model, serial number, and a description of the problem.

ITEM	CONTACT	CONTACT INFO
Computer	IT Help Desk	Ext. 4357 or helpdesk@mtsac.edu
Copier	Maintenance Provider/April Landry	Find tag on copier or call ext. 5510 or alandry@mtsac.edu
Equipment (classroom)	April Landry	Ext. 5510 or alandry@mtsac.edu
Furniture	April Landry	Ext. 5510 or alandry@mtsac.edu
Phones	IT Help Desk	Ext. 4357 or helpdesk@mtsac.edu
Printer	IT Help Desk	Ext. 4357 or helpdesk@mtsac.edu
Typewriter and small Office Machines	Sandi Horn	Ext. 5509 or shorn@mtsac.edu
Building Repairs (Lighting, A/C, plumbing, etc.)	Maintenance Department	Ext. 4850

INDEPENDENT CONTRACTOR

An independent contractor is a **self-employed person or entity contracted to perform work for—or provide services to—another entity as a nonemployee**. They can operate as an individual/sole proprietor using a Social Security Number and do not have an Employer's Tax ID number. They perform services for other clients and are hired to come to Mt. SAC to perform a specific, one-time task. They have the right to control the manner of performance of their services and set their own hours. The results of the work and not how it is accomplished is the primary factor. Independent Contractors have an investment in tools and facilities used for their business.

An Independent Contractor provides one-time professional services or short-term professional services for maintenance or repairs.

Examples of one-time Professional Services:

- Guest lecturer for a class
- Presenter for a POD workshop
- Costume or lighting specialist for theater production

Examples of short-term Professional Services:

- Piano tuning and maintenance at various times throughout the year

Requirements:

- Request a proposal Independent Contractor which describes the services he/she will provide, the date(s) of service, and the price.
- Complete an "[Independent Contractor Agreement](#)" and fill out [Independent Contractor Request](#) for approval.
- If this is the first time the Independent Contractor is providing a service for Mt. SAC, the Independent Contractor must complete a "[W-9](#)" using their personal social security number as their tax identification.
- Request Board approval from Department/division.
- Once Board approval is received, enter a Requisition in Banner, and upload executed Agreement, proposal, Board Agenda Item, along with an invoice to OnBase.

STANDING ORDERS

Purchasing can set up a “Standing Order” when small purchases are needed from a vendor, or if a purchase requires routine multiple payments throughout the year.

Examples:

- \$2,000 with ABC Electric for electrical supplies for Maintenance
- \$2,000 with Stater Bros. for food supplies for Child Care
- \$2,400 with Office Max for office supplies

Requirements:

- Must list manager authorized to approve and staff authorized to use this order in the requisition document text.
- Must state that the maximum a user can spend is \$499 on any single item. Individual items more than \$500 must be ordered separately, so that a fixed asset tag can be created, if applicable.
- Manager must sign off on delivery slips acknowledging receipt of goods, original invoices for payment and send original to Accounts Payable.
- Cannot be used for major equipment or tools costing more than \$500.

PROCUREMENT CARD PURCHASES

Purchasing can place an order using a College Procurement Card whenever a selling vendor will not accept a College Purchase Order for placement of the order. When this situation occurs, follow the procedure outlined in the “[Banner User Guide](#)” to prepare a requisition specifying “Credit Card” in the Requisition Comment Field.

Examples:

- \$90 with Amazon.com for an American History classroom DVD
- \$350 with Best Deal Software for computer software license for Child Care

Requirements:

- Must be for an amount not exceeding \$5,000.
- Each item ordered must be listed separately as an item on the requisition.
- All deliveries will be sent to the Warehouse where it will be received and forwarded to the ordering department on campus.
- This process can be used to purchase equipment, when needed.

PERSONAL REIMBURSEMENTS

If small purchases are made for the College using personal monies a reimbursement can be requested under the following conditions:

Examples:

- Purchase a book at a conference
- Special project supplies for a class project
- Purchase from a vendor who does not take purchase orders

Requirements:

- Must be **authorized in advance** by department/division manager and the Purchasing Director. If not, an employee may be liable for the purchase.
- Limited to less than \$500, unless otherwise authorized by Purchasing Director, or the Associate Vice President of Fiscal Services.
- Should **never** include equipment items (i.e. computer / printer) over \$500.
- Complete a [Payment Reimbursement Form](#), found on the Fiscal Services Forms and Reference Document webpage. Upload documents via ChromeRiver, include original invoice and/or receipt showing proof of purchase/payment and packing slip. Must include the reason for an event, the event date, attendees, and any other applicable detailed support.

SINGLE OR SOLE SOURCE VENDOR

Sometimes, there is only one source for that expensive item (over \$10,000) and the purchase is unique and/or proprietary to that vendor.

Examples:

- **Single Source** – Planetarium Zeiss Star Projector: only projector that meets our needs, although there are many star projectors and manufacturers.
- **Sole Source** – TracDat software for PIE & SLO/AUO process: this is the only software of its kind and it is proprietary to Nuventive LLP.

Requirements

- Submit a [Single/sole Source Form](#) to Purchasing for approval. If the product is proprietary, include a letter from the vendor.
- Once approval is received, enter a Requisition in Banner, and upload executed proposal and approved Single/Sole Source Form to OnBase.