



**UMPQUA**

Community College

## ADMINISTRATIVE PROCEDURE

---

**TITLE: PURCHASING**

**ADMINISTRATIVE PROCEDURE # 6330**

**RELATED TO POLICY # 6330 PURCHASING**

---

### Introduction:

1. In all procurements, the purchaser shall act in the best interest of UCC to determine best value and promote a fair and competitive process among vendors. Purchase decisions may be made on lowest price, but factors such as warranties, shipping and handling fees, delivery schedule, and quality should also be considered.
2. Public employees may not benefit directly from their position, or as a result of any transaction involving public funds as per ORS244.040. Further, UCC employees authorized to purchase on behalf of the College may not solicit or accept any gratuity from a vendor.
3. There are three primary thresholds governed by statute.
  - a. **Small** Procurements are less than \$ 25,000.00.
  - b. **Intermediate** Procurements are greater than or equal to \$ 25,000.00 but less than \$250,000.00.
  - c. **Large** Procurements are greater than or equal to \$250,000.00.
    - i. For large procurement a formal solicitation process must be completed. All formal solicitations must follow prescribed statutory rule as indicated in the Oregon Revised Statute, Oregon Administrative Rule, and the Community College Rules of Procurement.
    - ii. There are **exceptions** to these thresholds, which under certain conditions may affect the dollar amounts. Contact purchasing staff or refer to the college's principle body of rules – The Community College Rules of Procurement (CCRP), which are located on UCC's internet Purchasing page.

### A. Small Procurements:

#### 1. Decentralized Purchasing

UCC has decentralized purchasing authority for Small Procurements. Under most circumstances\*, purchases under \$25,000.00 generated at the department level may be completed if sufficient budget and signature authority exists. These

approval levels are established by the Office of Business Services and set in Banner.

## **2. Order to Pay**

With few exceptions identified in section A.5. a Banner generated Purchase Order is required for all purchases made on behalf of the College. The standard "Order to Purchase" process is as follows:

- a. Identify the need
- b. Identify the source and secure pricing
- c. Generate the Purchase Order (PO)
- d. The PO is routed for approval
- e. The PO is approved
- f. The PO number is submitted to the supplier
- g. The goods/services are provided and accepted
- h. The invoice, referencing the PO number is uploaded to DocuWare's AP File Cabinet
- i. The Invoice is processed and the check mailed.

## **3. Capital Equipment Purchases:**

All items of \$5,000 or greater must be purchased with a Purchase Order, receive full approval prior to placing the order, and charged to the proper Capital account.

## **4. Technology Purchases, (hardware *and* software):**

Technology related merchandise, including software, subscriptions, and peripheral accessories must be approved by the Information Technology Department. Make your request by entering a HelpTicket.

## **5. \*Exceptions to the Purchase Order Rule (include but are not limited to the following):**

- a. Travel and training related expenses.
- b. Purchases with suppliers that do not accept purchase orders. Some web-based businesses do not offer credit terms. A college issued Credit Card may be used.
- c. In a time-constrained situation or true emergency. Ex.: if a critical piece of equipment fails suddenly and use of cash or an issued credit card results in the quickest repair.

**Purchase Orders or more detailed and formal Contracts are required for Intermediate and Large Procurements.**

## **B. Intermediate Procurements:**

1. For procurements falling within the range of \$25,000 to \$250,000, it is imperative that the Purchasing Manager takes an active role to ensure adherence to relevant policies and statutes.
2. A Purchase Order is required, which may be generated in the originating department. An official Purchase Order when requested by the vendor must be acquired from the Purchasing Department.
3. A required minimum three (3) Quotes from different vendors ensures market competition and keeps vendors active and engaged. Communicating equally with each vendor is critical so no vendor has a competitive advantage.
  - a. Quotes may be accepted by any method, but the purchaser soliciting them must document all contacts and forward the information to the Purchasing Manager for the official files.
  - b. The official signed Purchase Order, complete with Terms & Conditions, is printed in the Purchasing Office.
  - c. Full system (Banner) authorization is required prior to sending the Purchase Order or communicating the Award.
4. If a formal contract is drawn up for this level purchase, it may only be signed and executed by the College President, Chief Financial Officer, or an authorized designee.

## **C. Large Procurements:**

1. For procurements above \$250,000 a formal solicitation process is required; with Board of Education approval for procurements of \$350,000 and above.
2. The Purchasing Manager has oversight responsibility for the Solicitation, Evaluation, Contract and Award and must be involved to ensure compliance with applicable policies and statutes. A Purchase Order and Formal Contract are required. The appropriate Solicitation type (e.g., RFI, RFB, RFP) and Contract type (e.g., PSC, PKS, CM/GC) are selected as most appropriate to the purchase.
3. Contracts above \$350,000 may only be authorized by Board of Education acting as the Local Contracting Review Board.
4. All formal solicitations must follow prescribed statutory rule as indicated in the Oregon Revised Statute, Oregon Administrative Rule and the Community College Rules of Procurement.
5. The formal Solicitation shall be made in writing and be advertised on the state website OregonBuys.gov and other avenues to ensure market coverage and fair market competition.
6. Formal written responses will be accepted by the Purchasing Manager or designee.

7. Responsive Bids or Proposals will be evaluated by UCC staff as facilitated by the Purchasing Manager. Contract Documents are submitted for legal review when necessary.
8. Full system (Banner) approval is required prior to order placement, award, or contract execution.
9. The College's Board of Education, acting as the Local Contract Review Board (LCRB) will be notified throughout the solicitation process.
10. The official signed Purchase Order with Terms & Conditions is included with the contract documents.
11. All related documentation and correspondence are kept in Purchasing Department files in accordance with BP 3310, Records, Retention, and Destruction.
12. Contracts at this level may only be signed and executed by the College President, Chief Financial Officer, or authorized designee.

#### **SPECIAL RULES AND OTHER PURCHASE TYPES:**

##### **1. Fragmenting a Purchase:**

Under no circumstances will UCC staff attempt to artificially divide or fragment a purchase in order to avoid Oregon Statutes as outlined above. (as per ORS279B.065 and ORS279B.070)

##### **2. Credit Card Purchases:** See AP 6331.

##### **3. Standing Purchase Orders:**

Purchases that generate multiple invoices for an extended time period may be generated as Standing Purchase Orders. The Purchasing Manager generates these with assistance from the originating departments generally during the first month of each fiscal year. All Oregon Statutes apply.

##### **4. Order to Direct Pay:**

When a Purchase Order is not possible and expediency is best practice, authorized staff may place an order (usually by phone or on-line) and accept an invoice. After confirming receipt of goods or services, authorized staff shall approve the invoice in DocuWare as per standard procedure. The approver's Banner authority must equal or surpass the invoice total. Direct Pay may only be applied to Small Procurements at the department level. Intermediate Procurement Direct Pay may be allowed in situations approved by authorized staff within the Office of Business Services.

##### **5. Proforma Invoice Payments.**

Pay-in-Advance or Partial Deposits for goods and services is allowed only under exceptional circumstances and is evaluated by the Purchasing Manager and Office of Business Services staff on a case-by-case basis. Contact the Purchasing

Manager prior to placing the order whenever a vendor requests this. This applies to all level of purchases.

**6. Payment Terms:**

UCC pays invoices with standard Net 30-day terms. The College will accept discounted terms when negotiated by the purchaser and properly communicated to Accounts Payable.

**7. College Store Purchases:**

The College Store staff handle their own procurement activity. Goods and services purchased for departmental use remain governed by Oregon Statute and Community College Rules. Items purchased for resale are exempt from standard competitive bidding requirements per CCR.228. Items such as textbooks, which may include Intellectual Property or Copyrights, are exempt from that process per ORS 279A (2)(h) and CCR.212.

**RESPONSIBILITY:**

The Purchasing Manager is responsible for implementing and updating this procedure.

---

**NEXT REVIEW DATE: 2025-2026**

**DATE OF ADOPTION: 11/12/2019 by CC**

**DATE(S) OF REVISION: 1/17/2024 by Law**

**DATE(S) OF PRIOR REVIEW:**