

COLLEGE *of*  
CHARLESTON

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PROCUREMENT

PROCUREMENT  
AND SUPPLY  
SERVICES

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*A QUICK GUIDE*

June 2014

To Our Customers:

We provide this informational manual for faculty and staff as a ready reference for those who are directly and indirectly responsible for acquiring goods and services for their department or program. More detailed guidelines and procedures are found online in the College of Charleston's [Procurement and Supply Services Manual](#). If you have any questions or need assistance, please call our office at 953-5510.

Thank you.

Wendy E. Williams, CPPO, C.P.M.  
Director Procurement & Supply Services

**Procurement Office**

Procurement is located in the Lightsey Center, 160 Calhoun Street, Room B53 and is open Monday through Friday (College holidays excepted) 8:30 a.m. to 5:00 p.m.

Phone: 843.953.5510  
Fax: 843.953.5444

**Central Warehouse**

Central Warehouse is located at 4750 Goer Drive, North Charleston, SC 29406 and is open from 8:00 a.m. to 4:30 p.m.

Phone: 843.308.6500  
Fax: 843.308.6502

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## PROCUREMENT SERVICES

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- Buy supplies, equipment and services
- Operate Central Stores (janitorial & maintenance supplies)
- Expedite the delivery of material
- Receive, deliver, and ship material
- Maintain inventory of college property
- Control the disposal of all surplus and obsolete property and equipment
- Ensure that South Carolina law is followed in all Procurement and Supply matters

## CUSTOMER SERVICES

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### *Purchasing Orientations*

Orientations are available for new personnel. They include eProcure, PCard and a basic purchasing overview. Please call 953.5510 to schedule a new employee briefing.

### *Planning and Consultations*

We consult with and assist you concerning your procurement needs, problems, or time schedules. We can advise on the timing of purchases and help develop a purchasing calendar. Some items require long lead times (8 to 12 weeks) for manufacture and delivery; therefore, involving Procurement early in the process is crucial to receiving goods on time.

### *Department Visits*

Discuss how we can better serve you, please schedule a visitation with a Procurement Officer, the Procurement Manager, or the Supply Manager. Can't come to see us? We'll come to you. We are always available at a mutually convenient time to assist.

### *Spend Data Analysis*

Have your department's total spend data presented to you in one easy to understand spreadsheet. After an initial presentation to your department, spend data can be delivered as determined by your department's needs.

### *Manuals and Tutorials*

A guide to the College's procurement and supply policies and procedures (including samples and blank forms), the PCard Manual, and eProcure tutorials are available at <http://procurement.cofc.edu/>.

**THE PROCUREMENT AND SUPPLY DEPARTMENT PURCHASES ALL SUPPLIES, SERVICES AND EQUIPMENT REGARDLESS OF THE SOURCE OF FUNDS.**

## ***WHAT PROCUREMENT DOES NOT PURCHASE***

Procurement does not purchase:

- College Bookstore resale merchandise
- Copyrighted Library materials (print and non-print)
- Travel (Under Travel Authorization)
- Personnel Services (not contractual employee services)
- Permanent Improvement Projects (through State Engineer's Office)
- Contracts with Architectural and Engineering firms
- Real Property Leases through State Real Property Management

## ***PURCHASING OUTSIDE PROCUREMENT***

Specific items exempted by law may be purchased and the payment to a vendor processed on an "Expenditure Authorization" (EA), which is processed by the Controller's Office. Examples of these types of purchases are:

- postage,
- published books, periodicals and technical pamphlets,
- public utilities,
- copyrighted educational films,
- filmstrips, slides and transparencies, or
- classified advertising

Before utilizing this method, review the [Procurement and Supply Manual, Sources and Methods of Purchasing](#) section. Purchases of allowable goods and services can be requested in eProcure using the EA Form, or if the amount is \$2,500 or less, the goods/services may be purchased using the State Purchasing Card (PCard).

## **LEGAL AUTHORITY TO MAKE PURCHASES**

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South Carolina's Procurement Code and the President of the College of Charleston vest procurement authority in the Procurement Director and staff, or as otherwise delegated.

Purchases made by other individuals are unauthorized and will not be approved retroactively. Individuals may be held personally liable for the purchase. This is true regardless of the source of funds.

## *WHO DOES THE BUYING?*

Procurement Officers function as buyers and are organized on a departmental and commodity basis. Call 843.953.5510 to be directed to the proper procurement officer.

Buying is our area of expertise! Our staff is here to assist at any time during the purchasing process.

## REQUISITIONER ROLE IN PURCHASING PROCESS

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You are very important because you are our customer.

**Procurement exists to serve you.** However, we both exist in an environment governed by extensive regulations. Here is how we can work together to get what you need:

- **Take no purchase action.** Do not commit the College to accept and pay for supplies, services or equipment without a purchase method determination by Procurement. All contractual terms and conditions must be reviewed and approved by the Procurement Office.
- **Plan ahead.** Industry lead times vary by commodity. Last minute purchases and rush orders cost more. Make equipment purchases as early in the fiscal year as possible. Each year Procurement publishes a deadline schedule (usually in March) for fiscal year-end purchases. Please keep the Procurement Department advised of future needs so we can assist in locating vendors and developing a purchasing schedule that will meet your needs.
- **Think generic.** The focus for evaluating equipment specifications should be based on PERFORMANCE AND NEED rather than BRAND. Specify brands only when proprietary (i.e., facial quality folded tissue - not Kleenex).
- **Work within the system.** Remember that Procurement is here to serve you and protect the College - - we need your help and cooperation to accomplish this goal!
- **Follow the guidelines.** There are state laws and regulations that govern how we purchase. As state employees, we all must comply with the South Carolina Consolidated Procurement Code.
- **Relay your needs.** Forward any questions or concerns.

## DEALING WITH SALES REPRESENTATIVES

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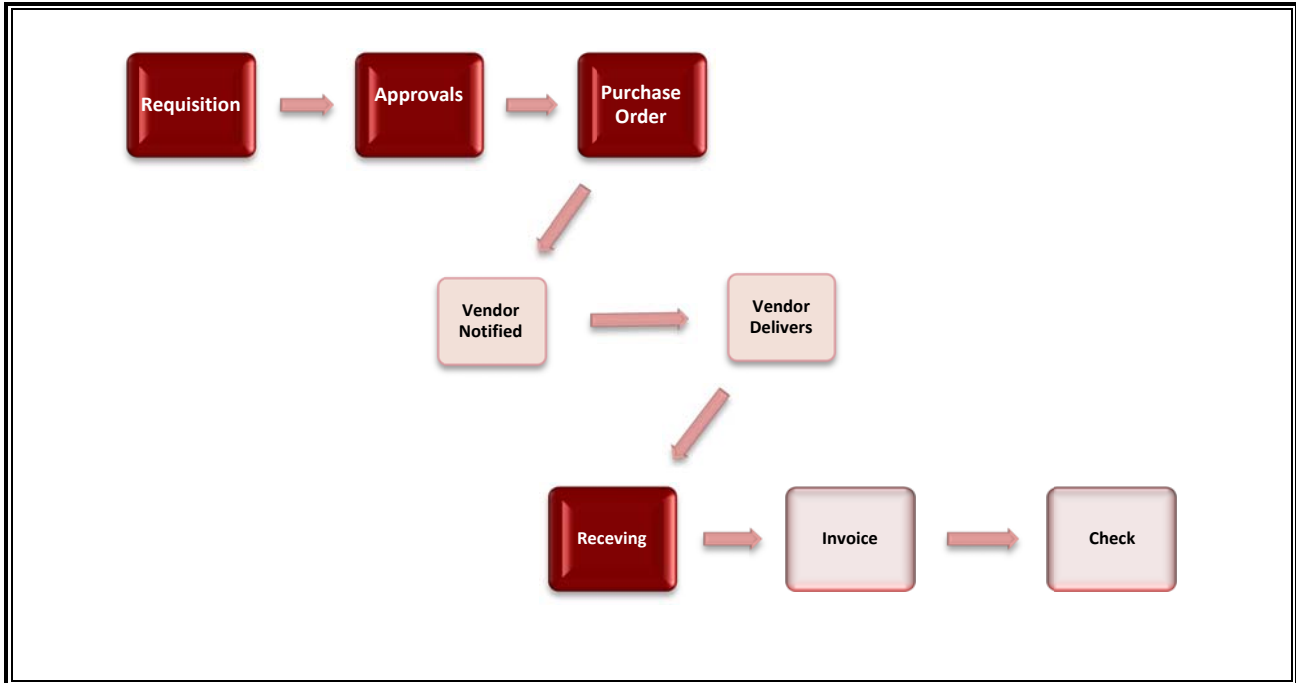
Vendors are a valuable source of information. Sales representatives may be contacted about their products and services. Use the following suggestions if dealing directly with vendors.

1. Whenever possible, contact more than one vendor when researching a need. The more alternatives and options considered, the more likely the final choice will be the most advantageous to the College.
2. Provide the same information to all vendors. State law requires that every vendor be given an equal opportunity to compete for the College's business.
3. When comparing vendor products, look at the total cost of ownership - start up, operating, maintenance, useful life, etc.
4. **Remember, no gratuities!** State law prohibits state employees from accepting direct gifts, indirect gifts, payments or any other object of value from vendors even though the intent of the gesture may be honorable or a customary practice of the vendor.
5. Samples for evaluation require a purchase order number from the Procurement Department prior to delivery of the sample to the College.
6. Utilize the skills of the vendors to develop required specifications. Remember that specifications should be based upon performance. What should the item or service do? What is the desired end result?
7. Do not use one vendor's specifications or use original vendor ideas and designs for competitive purchasing purposes. The idea is to explore the market but not to limit competition.
8. Refuse to sign a contract, an order, or letter of intent. All contractual terms and conditions must be reviewed by the Procurement Office. Refer the representative to the Procurement Office to protect the College and the requisitioner.
9. Once the decision on which product or service best suits the need is made, the purchasing process can start. Give Procurement as much time as possible to ensure the most economical buy.
10. The Office of Procurement has an online [Vendor Guide](#) to help vendors better understand how to do business with the College. Direct the vendor to Procurement's website for useful information.

# THE PURCHASING PROCESS

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## *Purchasing Work-Flow*



Create a shopping cart in eProcure and assign it to a requisitioner for your department, or place the order if you are a requisitioner. The requisition automatically moves through a workflow process gathering necessary approvals and arrives in Procurement. If the amount is a small purchase, the purchase order number will automatically be assigned and routed to the vendor.

If the amount is above the small purchase limit (\$10,000), the purchase order goes through a review process to determine what method of procurement is appropriate. A procurement officer applies the appropriate action and issues a solicitation. The requisition is processed (requirement is completed) and a vendor receives an award. As a final step, a purchase order is assigned and sent to the vendor. The progress of requisitions/purchase orders can be tracked in eProcure. Incomplete or erroneous requests will be returned to the requisitioner for correction.

Once goods and/or services are received a receipt must be created in eProcure. The vendor will send their invoice to the Controller's Office for payment. If goods/services are not received in eProcure, payment to the vendor will be delayed.



## STATE LIMITS ON PURCHASES

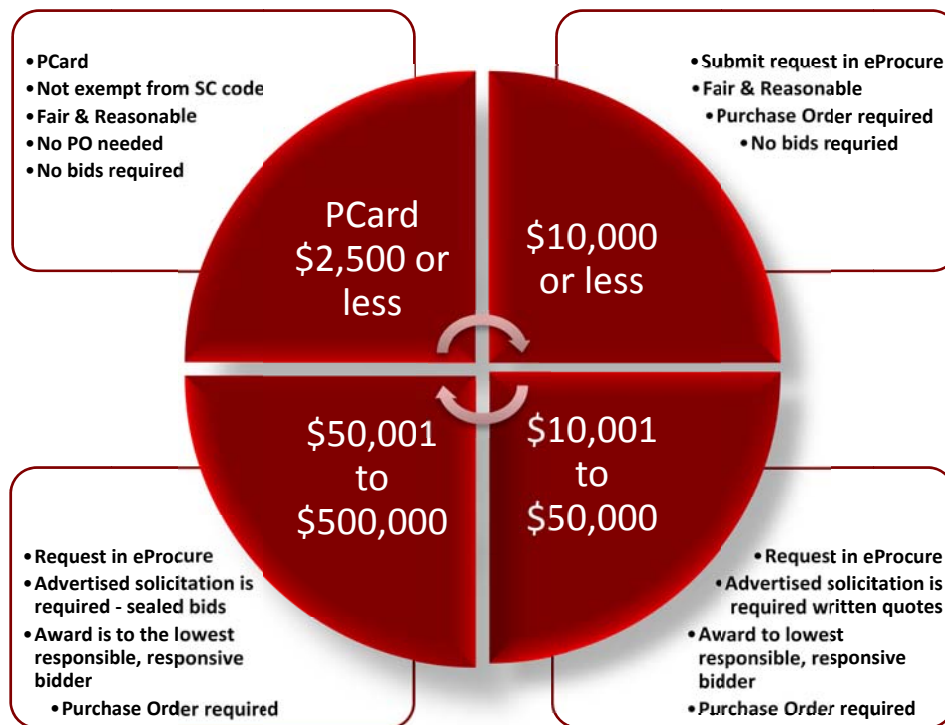
The following limits apply to all purchases not otherwise exempted regardless of the funding source. Note dollar limits at which competition is required.

Purchases of \$500,001 and more must be competitively bid by the State Material Management Office. IT purchases of \$200,001 and up must be bid by the IT Management Office.

Use the chart below to compare the different requirements for the type of purchase. As the purchase amount increases so does the amount of time between submitting a requisition and a purchase order being issued. This is due to the approvals required and the amount of time required for the bid to be advertised and awarded.

Please allow for this additional lead-time when planning purchases and delivery dates.

*Illustration 1*



## ACQUIRING GOODS AND SERVICES

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*Use the following methods to obtain nearly all goods and services required in advance. These methods preclude any need for "after-the-fact" documentation and ensure that the requestor will not be held personally liable.*

1. **College Surplus.** Check with Surplus Property, 843.308.6500, to see if the items in need are available in Surplus. Available surplus property can be viewed by appointment.
2. **Central Stores.** First source for janitorial and maintenance supplies. Complete an IDT (Intra-Departmental Transfer) using stock numbers in Central Stores Catalog. The order is normally delivered in 24 hours, or if there is an immediate need pick up the order from Central Stores. Want an item stocked? Let the Supply Manager know.
3. **Purchasing Card Program.** The Purchasing Card Program (PCard) is designed to provide department/activity heads with greater flexibility and improved response time when procuring small quantities of supplies for their department or program. Subsequently, the proper use of the Purchasing Card Program will facilitate decreased paperwork and turn-around time for small supply orders of \$2,500 or less.
4. **Customer Pick-Up.** Customers may pick up purchases paid for with their PCard.
5. **Routine Orders.** *The standard and normal purchase method* is to submit a requisition via eProcure for all orders. If the order is under the small purchase limit and has no additional requirements, a purchase order will be created and routed to the vendor within minutes. If the requisition exceeds \$5,000 it will require the department's Executive Vice President's approval and will be automatically routed for his/her approval.

Purchases from \$10,001 - \$50,000 require a request for quotations, must be advertised, and written quotations obtained. Generally the order is placed in 3-4 weeks after the request.

Sealed bids are required for purchases of \$10,001 up to \$500,000 and require from 30-60 days to bid and award. Purchases over \$500,000 take 60-90 days and longer to bid and award as they are handled through the SC Procurement Office.

6. **Emergency Orders.** For emergency purchases, repairs, or other situations where it is not practical to prepare an order in advance, Procurement can place order for you. Please note that failure to plan ahead is not justification for an emergency order.
7. **Sole Source Purchases.** When an item is available from only one known source and exceeds \$10,000 an order may be placed without competitive bids if sufficient, written justification is provided and sent with the requisition. There is a special form available from Procurement for this purpose. Before an order can be released, Procurement must verify and approve the purchase as a sole source.

8. **Blanket Orders.** Requisitioners can charge and pick up small items from local vendors that do not take the Purchasing Card. Orders are limited to fiscal year duration. Contact a procurement officer for additional information.

9. **Contracts.** State and College blanket contracts contain many repetitive or commonly used items. *The advantage is convenience and the knowledge that the requisition does not require the time to be bid.* Carpet, film, toner cartridges, furniture, laboratory chemicals and supplies, computers, and copiers are just a few of the items available on contract. If specific goods or services are purchased repetitively, it may be advisable to solicit a term contract. Your procurement officer can help you with this.

10. **Copying/Printing.** The College Copy Center is an auxiliary service and can accommodate most small and large quantity copy needs. Printing needs beyond the capabilities of the Copy Center should be referred to Procurement for purchase.

### ***PURCHASE APPROVALS***

The department chair, dean, or executive vice president generally has the authority to approve purchase requests for their area of authority. In accordance with state regulations and college policy, some items require additional approvals at the college and state level.

This table has examples of purchases requiring additional approvals.

<b>Special Purchase</b>	<b>Approver</b>
Sole Source Purchases	EVP for Business Affairs via Procurement Director
Emergency Purchases	EVP for Business Affairs via Procurement Director
Trade-in Purchases with an original acquisition cost of over \$10,000	Materials Management Office via Procurement Director

### ***TRACKING PURCHASE ORDERS***

Track requisitions and purchase orders in eProcure using the *Document Search* Tab. Departments may check the status of an order directly with the vendor; however it is best to let the assigned procurement officer follow up. Any changes to the order must be coordinated with the Procurement Department. Submit requested changes to an existing order by completing the *PO Change Request* Form in eProcure. Procurement will review and issue a written change order to the vendor. This order will be updated in eProcure and Banner.

Questions about expediting an order or an overdue order should be addressed by the Procurement Officer. Provide the assigned Procurement Officer with the vendor name, purchase order number, and the due date of the order in question.

## RECEIVING GOODS

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Material is normally received at Central Receiving and the warehouse staff will process the receiving documents. In some circumstances material is scheduled to be delivered directly to the department. In those cases, it is the receiving department's responsibility to create the receipt directly in eProcure.

Normally, goods and equipment delivered to Central Receiving will be delivered to the ordering department destination shown on the purchase order within 24 hours.

Departments are required to inspect goods and equipment upon receipt and notify Central Receiving immediately if there is a problem.

Personal packages should not be directed to Central Receiving. Neither security nor delivery can be provided for personal shipments with State supported resources.

### REMINDER

C.O.D. deliveries will be refused. Material that arrives at Central Receiving without a valid College of Charleston purchase order number may also be refused. If a PCard order is shipped to Central Receiving it must have the PCard holder's name on it and "PCP" in the address.

## COLLEGE EQUIPMENT INVENTORY CONTROL

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Equipment purchased by the College with a unit cost of \$1,500 or more, is affixed with a green tag (P-Tag) or other marking as College property. Certain types of equipment with a value less than \$1,500 receive a gold tag and are not reflected on the department inventory reports.

As College employees, we are responsible for safeguarding all College Plant Property. Department Heads have the ultimate responsibility for maintaining proper accountability of property in their division. Inventory copies are provided prior to and after each inventory. A Plant Property Inventory is taken and reconciled annually. Your cooperation during this inventory is appreciated.

For inventory purposes, movement of tagged College property equipment should be reported to the Property Inventory Specialist 843.308.6500 using the *Change in Accountability* Form. To dispose of surplus or obsolete equipment contact the Property Inventory Specialist at 843.308.6500. Do not dispose of College property without involving Inventory Control!

Trade-in of used for new equipment is permitted with prior approval when it is in the College's best interest. Trade-ins with an original acquisition cost of over \$5,000 must be approved by the State Procurement Office.

## SHIPPING OUT

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There are many different options for shipping out. Consider the size of the package and the time-frame for delivery. Use the table below to assist in the decision.

Option	Type of Packages	Procedure
Central Receiving 308.6500	<ul style="list-style-type: none"> <li>• Ship out packages and equipment for repair</li> </ul>	<ul style="list-style-type: none"> <li>• Properly identify the material and arrange to get the material to Receiving</li> <li>• Prepare an Intra-Departmental Transfer (IDT) form to cover shipping charges.</li> <li>• If needed, Warehouse personnel will pick up and assist in packaging</li> </ul>
Mail Services 953.2089	<ul style="list-style-type: none"> <li>• United States Postal Service Express - overnight mailing labels and envelopes are available at the mailroom</li> <li>• Packages (under 70 lbs.) and letters</li> </ul>	<ul style="list-style-type: none"> <li>• Prepare the package or letter for shipment using desired carrier</li> <li>• Complete label and IDT for shipping charges</li> <li>• Deliver package and IDT to mailroom</li> </ul>
College Bookstore 953.5518	<ul style="list-style-type: none"> <li>• UPS - envelopes are available at the bookstore</li> </ul>	<ul style="list-style-type: none"> <li>• Prepare the package or letter for shipment</li> <li>• Complete label and IDT for shipping charges</li> <li>• Deliver package and IDT to bookstore</li> <li>• Can use PCard for payment</li> </ul>