

# Rules of Purchasing

When placing an order using the purchase requisition, the more information included—the better. The Buyer needs a complete description of the item ordered. In addition, if the end-user has already talked to the vendor and negotiated special pricing, options, or delivery arrangements, that specific information needs to be conveyed in the Comments field of the purchase requisition. All of this information must be conveyed either through the requisition, or by sending this information to Purchasing under separate cover. Remember, when in doubt, INCLUDE IT!

This section briefly explains the following topics:

- Item Description
- Equipment
- Blanket Orders
- Professional Services
- Software
- Subscriptions
- Memberships
- Bid Limits
- Trade-Ins
- Conflict of Interest

## **Item Description**

The NOUN is always FIRST, followed by the description, then the manufacturer if applicable, and finally the model or product number.

Example A: TYPEWRITER, ELECTRIC, IBM, MODEL 8533

Example B: BOOK, ENGLISH FOR EVERYONE, ISBN 0-123-456-78 – *(Note: Publishers rarely look at the title when filling orders. So it's very important to have the ISBN number correct.)*

Example C: CONSULTANT SERVICES, FOR GRANT WRITING

## **Equipment**

When purchasing equipment, all options, components, and enhancements should be bundled with the equipment. However, separate operating pieces of equipment which may function independently of the equipment, should be separated (its own line item).

Example A: 1 EA MICROCOMPUTER, P4, 400 GHZ WITH ADDITIONAL RAM,  
INTERNAL MODEM, AND INTERNAL DISK DRIVE (bundled with all  
the components)  
1 EA MONITOR *(always a separate item- and remember that there is a State  
of California recycling fee of \$8 per monitor, list as a separate line item)*

- 1 EA MICROSCOPE, WITH LIGHT SOURCE AND SPECIAL EYEPIECES  
(*bundled with all the components*)
- 1 EA TABLE, MICROSCOPE, WITH ADJUSTABLE HEIGHT HANDLE  
(*separate item*)

*For Systems Furniture:*

- Example B: 1 EA WORKSTATION, TO INCLUDE DESKTOP, PEDESTAL, OVERHEAD  
BIN, TASK LIGHT (*bundled with all the components*)
- 1 EA CHAIR, DESK (*always a separate item*)

## **Blanket Orders**

Blanket Orders are for recurring purchases of supplies or services. They should only cover the current fiscal year. When providing a description, it must include a class of items being purchased, the site and department ordering the supplies, the time period covered, and a District-authorized person who will be making contact with the vendor to order goods or services.

Example A: \*\*\*BLANKET ORDER\*\*\*  
FOR THE PURCHASE OF LABORATORY CHEMICALS  
FOR MESA COLLEGE CHEMISTRY DEPARTMENT  
EFFECTIVE 7/1/## THROUGH 6/30/##  
AUTHORIZED PERSONS: JIM SHAW OR JANE SMITH  
619-388-####

Example B: \*\*\*BLANKET ORDER\*\*\*  
FOR FEDERAL EXPRESS SHIPMENTS FOR DISTRICT FACILITIES  
EFFECTIVE 7/1/## THROUGH 6/30/##  
AUTHORIZED PERSON: IDA LANE 619-388-####

## **Professional Services**

Before contracting for services, read the District's Procedure 8500.2, dated July 1, 1991, "Consultant Contract" to ensure that you meet all the legal definitions of a consultant versus an employee. Fill out the "Evaluation of Employer/Employee Relationship" form and a consultant agreement. Both of these documents should be forwarded to Purchasing under separate cover attached to a *Requisition Sheet*. (These forms are available on the *For Employees* page of [Purchasing's website](#)). Consultant agreements **cannot** be made with District employees.

When submitting a purchase requisition for consultant services, the purchase requisition and the agreement must include; time period, point of contact for the District and consultant, and tasks to be accomplished. The consultant agreement and the "Evaluation of Employer/Employee Relationship" form must be attached. The only authorized signature for

the contract is the Director of Purchasing and Contract Services, so be sure to include a place for his signature.

Example:

GRANT WRITING SERVICES FOR DISTRICT DISABILITY SUPPORT PROGRAMS  
AND SERVICES  
EFFECTIVE 9/1/## TO 1/31/##  
CONTACT PERSON: MARY LEWIS 619-388-####  
CONSULTANT AGREEMENT ATTACHED.

## Software

When ordering software, there are many options; platforms, license only vs. boxed sets, physical delivery vs. downloads, new vs. upgrade. All of this information must be conveyed to ensure that you get the right item.

SOFTWARE, HOW TO BUILD A BETTER MOUSE TRAP, FOR WIN (*Platform Windows or Mac*), (*indicate whether you want license, media, manuals*) LICENSE AND CD ROM ONLY (*new or upgrade*). UPGRADE FOR #GHRJ12346. (*Upgrades always need some kind of verification of original purchase – usually serial number*)  
Be sure and include end user's name, phone number, and email address

## Subscriptions

Subscriptions should indicate whether they are new or renewals. Indicate the beginning and ending date, the site name, department, title of person, and address. **Subscription should never be addressed to an individual.** If it is a renewal, the account number of the subscription must be included.

Example A: RENEW SUBSCRIPTION TO "ENGLISH TODAY"  
EFFECTIVE 7/1/## to 6/30/##  
ACCOUNT #123456

LABEL TO: SAN DIEGO CITY COLLEGE  
ENGLISH/DEPT CHAIR  
1313 PARK BLVD  
SAN DIEGO CA 92101

Example B: NEW SUBSCRIPTION TO "COMMUNITY COLLEGE WEEK"  
EFFECTIVE 7/1/## to 6/30/##  
LABEL TO: SAN DIEGO COMMUNITY COLLEGE DISTRICT  
CHANCELLOR  
3375 CAMINO DEL RIO SOUTH  
SAN DIEGO CA 92108

## **Memberships**

Memberships are very similar to Subscriptions. Labeling should be the same, but you also need to include a contact name, phone number, and email address. **Remember the District can only maintain institutional memberships.** Individual memberships cannot be paid from District funds.

Example A: RENEW MEMBERSHIP TO “THE ASSOCIATION  
OF COMMUNITY COLLEGES”  
EFFECTIVE 1/1/## to 12/31/##  
ACCOUNT NO. 12345555  
LABEL TO: SAN DIEGO MIRAMAR COLLEGE  
VP OF INSTRUCTION  
10440 BLACK MOUNTAIN ROAD  
SAN DIEGO CA 92126  
CONTACT PERSON: DR RICH GARCIA: 619-388-####  
email: rgarcia@sdccd.edu

Example B: NEW MEMBERSHIP TO “FEDERATION  
OF COLLEGE HONORS PROGRAMS”  
EFFECTIVE 7/1/## to 6/30/##  
LABEL TO: SAN DIEGO MESA COLLEGE  
HONORS/COORDINATOR  
7250 MESA COLLEGE DRIVE  
SAN DIEGO CA 92111  
CONTACT PERSON: JANET SMITH 619-388-####  
email: jsmith@sdccd.edu

## **Bid Limits**

California Public Contract Code Section 20111 and 20651 require a public competitive bid for Public Works over \$15,000 and for the purchase of equipment, materials, supplies, or services over \$69,000 (effective 1/1/07 – adjusted annually). For more information contact the Purchasing Department.

## **Trade-Ins**

California Education Code 81450 does not allow the use of a trade-in when purchasing new equipment without a public bid. So, old equipment in any condition cannot be used as a trade-in unless there is a public competitive bid process conducted for the purchase of the new equipment that includes the trade-in.

## **Conflict of Interest**

The District **DOES NOT** allow purchases of goods or services from District employees – **NOT EVER!**