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## Purpose

The purpose of this procedure is to set forth the dollar limitations for informal purchases and to define the process for preparing requisitions and supplemental materials to be included with a requisition to support the purchase request. Informal purchases as referenced herein and in the Purchasing Desktop Procedures Manual are defined as those bid/proposal solicitations less than the amount specified in Florida Statute 287.017 for Category Three (currently \$65,000) and do not require approval of the District Board of Trustees. Purchasing services from an individual require the use of an Other Personnel Services (OPS) Agreement in accordance with APM 03-0504.


## Conflict of Interest

No College employee shall solicit or accept anything of value from a current or prospective supplier for personal gain. In accordance with F.S. 112.(Part III) (Code of Ethics for Public Officers and Employees) and APM 02-0211, no College employee shall, while acting in a private capacity, rent, lease or sell realty, goods or services to the College without first obtaining the approval of the Vice President for Business Services or the Associate Vice President for Administration. When considering vendors for any purchase, College employees shall not recommend or do business with a vendor who donates funds, goods or services solely because of their donor status. Employees should always strive to purchase items and services at the best value (lowest cost for the quality level needed). Transactions of \$10,000 or more with major donors (business entities who have donated or plan to donate more than \$10,000 in a calendar year to the College or the FSCJ Foundation, Inc.) must include documentation justifying the value of the transaction. The FSCJ Foundation, Inc. shall provide a list of major donors to the Purchasing Department annually.

## Purchasing and Forms of Payment Chart

Purchase/Expense Type	Amount	Form of Payment
Goods and Services	< \$7500	P-Card or Voucher
Goods and Services	\$7500 or more	Requisition/Purchase Order
Hazardous Materials and services requiring Insurance Verification	< \$7500	Requisition/Purchase Order
Assets	\$5,000 or more	Requisition/Purchase Order
OPS Contract*	<\$7500	Voucher
OPS Contract*	\$7500 or more	Purchase Order
Fund 06 Expenditures	Any amount	P-Card or Voucher
IT	<\$7500	P-Card or Voucher (prior IT authorization required) or Requisition
IT	\$7500 or more	Requisition/Purchase Order
Assets Purchased with Grant Funds	\$1000 or more	Requisition/Purchase Order
Firearms	Any amount	Requisition/Purchase Order

\*Refer to APM 03-0504, Issuance of Other Personal Services Agreements, for detailed procedures

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\*\*Refer to APM 05-0602, Purchases from Federal Grants/Contracts, for detailed procedures

## Procedure

- A. Training: All employees whose duties include requisition preparation and voucher entry must complete required training prior to receiving authority to input requisitions and vouchers.
- B. Lead Time: When entering a requisition adequate lead time for purchase and delivery of items must be considered (Purchase category as defined by F.S. 287.017).

Type	Requisition Value	Approximate time for Process to Award
Direct Price	\$0 to \$7,499.99	1 weeks
Two Quotes	\$7,500 to \$19,999.99	2 weeks
Three Quotes	\$20,000 to Purchase Category Three (\$64,999.99)	3 weeks
Formal Bid	Purchase Category Three (\$65,000) to Purchase Category Five (\$324,999.99)	5-7 weeks
Formal Bid (with Board Approval)	More than Purchase Category Five (\$325,000)	9-12 weeks

Lead time begins after a requisition is both successfully committed and all on-line approvals are completed. If funds must be encumbered, delivery completed and invoice paid by a specific date to meet the terms of a grant or for any other reason, this must be stated by the requisitioner in the requisition header comment section.

- C. Purchases up to \$64,999.99 are made under informal purchase procedures. Pursuant to F.S. 287.057(8), requisitions for the same scope/commodity/services are not to be split to avoid formal competitive bidding.
- D. Property, Supplies and Services (Not Including Construction)
  - 1. Purchases of property, supplies and certain services are routinely handled in the following manner.
    - a. \$7,499.99 or less: Direct price procedures may be used for telephone/fax bids at the discretion of the Purchasing Department. Direct price means that purchase orders can be issued based upon an email/fax confirmation of current prices to avoid change orders. Good judgment shall be exercised by the applicable Purchasing Agent and the Executive Director of Purchasing or Associate Vice President of Finance to ensure that no purchase is made at an unreasonable price.
    - b. \$7,500 to \$19,999.99: Fax, electronic or written quotations shall be solicited from not less than two (2) vendors who are capable of bidding competitively on the material/service

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required, unless a Sole Source Justification Request Form is completed and justified as defined in APM 05-0302.

- c. \$20,000 to \$64,999.99: Fax, email or written quotations shall be solicited from not less than three (3) vendors who are capable of bidding competitively on the material/service required unless a single bid process is justified.

- 2. Quotations (documented for \$7,500 to \$64,999.99) may be solicited when the requirement(s) is such that the material/service can be easily described in non-technical terms; however, a written quotation shall be used when necessary to fully communicate specifications and conditions to prospective bidders.

- a. If the informal quote process (documented for \$20,000 to \$64,999.99) cannot adequately define specifications then written Request for Quote (RFQ) solicitations (to be pre-approved by the Executive Director of Purchasing or Associate Vice President for Administration) shall be solicited using the invitation to bid or request for proposal process from a minimum of three (3) vendors (preferably five or more to ensure adequate response), who are capable of bidding competitively on the material/service required.

- 3. Sketches and/or specifications sufficient to define the scope of the work shall be transmitted with a requisition to the Purchasing Department for solicitation of written RFQ's from at least three (3) qualified contractors using the printed RFQ or informal Request for Proposal (RFP) form to be signed by the Executive Director of Purchasing or Associate Vice President for Administration.

E. If two equal bids are received:

- 1. Award shall be to that supplier domiciled in the State of Florida.
- 2. If still tied the Purchasing Department will break the tie by a flip of a coin.

F. All grant funded requisitions should be entered in compliance with APM 05-0602. A copy of the approved grant shall be delivered to the Purchasing Department with the requisition. The Purchasing Department will confirm compliance with APM 05-0602, if applicable.

G. Informal Bid Purchases

For informal RFQ purchases, the Executive Director of Purchasing or Associate Vice President for Administration is authorized to allow and sign for purchase orders based on multiple awards under a written solicitation for up to 365 days after the bid opening date so long as the supplier concurs. This method of multiple awards is used to avoid additional bid preparation cost within a relatively short period of time. However, this does not relieve the Purchasing Agent from trying to obtain additional quantity discounts where possible or monitoring commodity deflationary trends.

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H. Media Placement Purchases

The purchase of media placements, (i.e. radio, television, billboards, etc.), when not exempted as defined in State Board of Education Rule 6A-14.0734 and APM 05-0302, will require the solicitation of competitive quotations as follows:

Dollar Amounts	No. of Informal Quotations Required to be Solicited
\$0 - \$64,999.99	1

I. Minority/Woman Business Enterprise (M/WBE) Misrepresentation

Businesses that file false representation of their MBE/WBE status or a subcontractor's status shall be barred from bidding for a period of no less than 36 months pursuant to Florida Statute 287.094.

J. Construction

1. Purchases of construction services (which includes repair of fixed equipment by repair or replacement) are routinely handled in the following manner:
  - a. Specialty services that are \$24,999.99 or less (applicable to small simple construction projects only, not equipment/supplies purchases,) may be purchased without competitive bidding at the discretion of the Executive Director of Purchasing or Associate Vice President for Administration and the Associate Vice President of Facilities.
    - i. A qualified and competent single contractor of the appropriate trade will be required to visit the work site accompanied by the Associate Vice President of Facilities or a representative of the Facilities Department to ascertain the work to be performed.
    - ii. Upon receipt of an acceptable written proposal and request to purchase as a single source the Associate Vice President of Facilities will prepare an online requisition to cover the cost and transmit both the requisition and the contractor's proposal as back-up to the Purchasing Department for the issuance of a purchase order.

K. Purchases Exempt from Solicitation and Sole Sources

For detailed information regarding non-federally funded purchases greater than \$7,500 that do not require the solicitation of competitive bids or proposals see APM 05-0302, Purchases Exempt from Solicitation and Sole Source Purchases.

L. Items Precluded from Purchasing with State funds include, but are not limited to:

1. Greeting cards of any nature (F.S. 286.27).
2. Artist items to be used in the interior of offices (F.S. 255.043).

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3. Artist items shall be allowed to be purchased if less than or equal to .05 percent of the original construction cost of a facility as long as purchased when first constructed as long as they are purchased for viewing in public areas, not individual private offices with limited public access.
4. Briefcases with employee's initials, intended for personal use.
5. Personalization (initials) of any item.
6. Religious items of any nature.

#### M. Purchasing Department Responsibilities

1. Responsibilities of the Purchasing Department are provided in the Purchasing Desktop Procedures. These include, but are not limited to ensuring requisitions and subsequent purchase orders are in compliance with applicable federal and state laws, rules and regulations. The responsibilities also include reviewing requisitions to ensure the following:
  - a. materials or services requested are consistent with the purpose for which the funds were appropriated;
  - b. materials or services required describe minimum functional capabilities and are not over-specified;
  - c. equivalents are allowed, where possible;
  - d. limits are specified to meet foreseeable needs of the requisitioner; and
  - e. referral of all questionable items to the end-user supervising budget administrator.

#### N. Preparation of Specifications

1. Purchasing staff herein referred to as Purchasing Agent, provide assistance creating requisitions, as necessary. Pursuant to Florida Statutes 287.057(9) and 287.057(17) (c), departments may not ask vendors to assist in developing procurement specifications nor divide a requirement into multiple requisitions to circumvent these procedures. When the total amount of the requisition is higher than the competitive informal quote limit (\$7,500), or if requested by the requisitioner, the Purchasing Agent will help develop specifications for quoting equipment, services and consumable supplies.
2. Items exempt from competitive bidding pursuant to State Board of Education Rule 6A-14.0734 and those described in APM 05-0302 do not require written specifications. For complex specifications, the budget administrator may appoint a committee to prepare the specifications. The Executive Director of Purchasing generally serves as chair or facilitator for such a committee.
3. The Purchasing Agent's standard procedure is to solicit maximum competition by inviting the

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submittal of equivalent products. Other than on federally funded purchases, the requisitioner may request a Purchasing Agent to solicit quotations/proposals of a specific brand on a “no equivalent” basis by completing and submitting for approval an ERP Sole/Single Source Justification Request Form and entering “see sole/single source form” in the requisition header “department notes” field. An ERP Sole/Single Source Justification Request Form is to be completed when purchasing additional component parts for existing equipment or systems. See APM 05-0302 for details regarding Sole/Single Source procedures.

4. Any business paid to develop bid specifications pursuant to F.S. 287.057 (17)(B)(2)(C) shall not be allowed to bid on that solicitation.

#### O. Funding

Funds equal to or exceeding the estimated amount of purchase must be available in the designated budget and appropriate Account Code before creating a department requisition. Funds are committed (i.e. deducted from the balance available column and added to the committed/pre-encumbered column) upon successfully sending the requisition for approval. The amount of the requisition should be the total estimated amount of the purchase. The Purchasing Department in awarding a contract is authorized to exceed the initial estimate by a maximum of \$150, provided funds are available and no restriction is placed on the requisition by the requisitioner. An increase greater than \$150 requires the Purchasing Agent to obtain written approval from the department budget administrator.

#### P. Process for input of a requisition

1. The requisitioner enters a suggested supplier name by selecting a supplier in the database. If the supplier is not in the database, the requisitioner may enter a “suggested supplier” in the suggested supplier field. If the supplier is not listed in the table, the requisitioner shall email [suppliercontact@fscj.edu](mailto:suppliercontact@fscj.edu) to request supplier entry.
2. Like services or equipment may be combined on one requisition by use of different requisition line items. Different commodity classes (e.g. dental supplies, building supplies, musical instruments) should not be entered on the same requisition.
3. Backup attachments, including written quotes or special approvals are to be attached to the requisition when the requisition is entered.

#### Q. Purchase Description

A full purchase description setting forth the essential physical and functional characteristics of the materials or services is required. As many of the following characteristics should be utilized as are necessary to express the minimum requirements of the College and should be utilized in preparing a purchase description:

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1. Common nomenclature (i.e., a noun, software or a printer)
2. Kind of material (i.e., type, grade, alternatives, etc.)
3. Electrical data (if any)
4. Dimensions, size or capacity (stated in minimum/maximum parameters)
5. Principles of operation
6. Restrictive environmental conditions
7. Intended use
8. Equipment with which the item is to be used
9. Any other pertinent information that further describes the item, material or service
10. Brand name, model number, or equal purchase description

**R. Requisitions for Blanket Purchase Orders**

A Blanket Purchase Order (BPO) encumbers funds to a vendor to facilitate multiple small-dollar purchases during a defined period of time. BPO's are not to be used for the purchase of various undefined hazardous chemicals, software or any single tangible item costing more than \$4999.99 each. BPO department requisitions must include a definition of the following:

1. The kind of supplies or services to be purchased.
2. The maximum dollar limit for each BPO transaction (normally not to exceed \$7,499.99 per transaction).
3. The time period during which purchases will be made. Fund I BPO's cannot extend beyond the end of the fiscal year in which they are created. Fund II and Fund VII BPO's may cover the duration of the project.
4. The names of College employees authorized to make purchases. (Each authorized person will be required to show a copy of the BPO and their photo identification to the local vendor upon purchase to verify authorization.)

**S. Requisitions for Hazardous Chemicals**

1. Federal, State of Florida and College Board Rules are published for safeguarding use, ordering the disposal of products defined as hazardous to humans, animals and the environment. Hazardous

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material may only be purchased using the department requisition process and resultant purchase order. Hazardous materials may NOT be purchased using a P-card, petty cash or voucher (including reimbursement for out-of-pocket money).

2. College procedures require the use of account 6650400 for hazardous chemicals for “instructional” use, and account 6600600 for “non-instructional” use.
3. To order hazardous chemicals:
  - a. In addition to the requirements above for all BPOs listed in Section T, hazardous materials blanket purchase orders may be utilized provided that all specific hazardous materials expected to be purchased are listed with the required usage information. Requestors shall begin the item description field with “blanket purchase order for the purchase of <item(s)>”
  - b. Enter a requisition using the Special Request requisition process for the Hazardous Material using the required account code for Hazardous Materials will route the requisition for review /approval by the College’s Environmental Health and Safety Department.
  - c. The following usage information must be notated in the “additional information” field for each hazardous item: quantity on hand (QOH), estimate of next six (6) months usage (NSM) and the last six (6) months usage (LSM) in the additional information field. Hazardous material requisitions require online approval of the Occupational Health and Environmental Safety Coordinator or their approved alternate prior to submission to the Purchasing Department. If the quantity is considered excessive, the department administrator will be asked to document and justify the quantity prior to purchase action.
  - d. The requisition and resultant purchase order must include a requirement that the vendor provide the SDS (Safety Data Sheet) with the shipment. This shall be accomplished by including the phrase “Vendor must provide SDS with shipment” in the “enter requisition comments” field on the “checkout – review and submit” page and selecting the “send to supplier” checkbox.

**IMPORTANT NOTES:** The SDS sheets are to be maintained in both the department(s) using the chemical, as well as in the campus security office. Contents shall be labeled adequately on the exterior and interior packaging. The College requires all hazardous chemical waste and regulated waste disposal to be documented on a manifest and signed by either the Occupational Health and Environmental Safety Coordinator or an authorized and certified campus designee.

## T. Invoice Processing

The supplier who provides materials or services in a satisfactory manner, expects, and is entitled to prompt payment. Prompt payment of invoices is one action that must be required of all College employees involved with any aspect of invoice processing for College compliance.



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U. Fiscal Year End Deadlines

Deadlines for submission of requisitions are contained within the Year End Memorandum issued by the Finance Department in the spring of every fiscal year. These deadlines are strictly enforced. Fund I current expense (600000 Accounts) requisitions which are input according to these deadlines may use current fiscal year funds, if items are received and paid for before the end of the fiscal year. Requisitions input after these deadlines may result in purchases being charged to the following fiscal year's budget. Fund I capital outlay (700000 Accounts) requisitions need only be encumbered by the deadlines to use current fiscal year funds, since capital outlay encumbrances roll over (i.e. accrue) to the following fiscal year.

REFERENCES: F.S. 112 (Part III), 255.043, 255.249, 286.27, 287.017, 287.057(8), 287.057(9), 287.057(17)(c), 287.057 (17)(B)(2)(C), 287.094, 1001.64, 1001.65, SBE Rule 6A-14.0734, State Requirements for Educational Facilities (SREF).

Adopted Date: October 4, 2017  
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