

SUBJECT: PURCHASING OF EQUIPMENT

EFFECTIVE
DATE: 04-05-11 (replaces 01-28-10)

APPROVED BY:

Reviewed (no changes): _____

Executive Director

POLICY

It is the policy of McIntosh Trail CSB that all procurement transactions provide, to the maximum extent practical, open and free competition, only subjected to the limitations set forth in the following procedures.

PROCEDURE

- A. The Area's officers, employees or agents shall neither solicit nor accept gratuities, favors, or anything of monetary value from contractors, (vendors or suppliers) or potential contractors. This is not intended to preclude bona-fide institutional fund raising activities.
- B. No employee or agent shall award contracts where any of the following has a financial interest:
 - 1. The employee;
 - 2. Any member of his or her immediate family;
 - 3. His or her partner;
 - 4. Any organization in which any of the above is an officer, director, or employee;
 - 5. A person or organization with whom any of the above individuals are negotiating or have any arrangements for prospective employment.

AUTHORIZATION:

Purchases shall be approved only by the authorized persons or his/her designee.

BUDGET:

Each equipment item costing \$100.00 or more must be budgeted in the original budget or in a revision. A Critical Equipment Form must be completed for each item being purchased. Items to be purchased from the same vendor can all be put on one Critical Equipment Form (**do not mix vendors**). The Critical Equipment Form will be stamped "APPROVED" and returned to you **before the purchase can be made**. Critical Equipment Forms are to be typed in Form.docs. Handwritten forms are no longer accepted.

ORDERING:

Purchase order numbers shall be issued by the Financial Resources Department for purchases of equipment **prior to purchase**. In those instances when a vendor requires a purchase order number for items other than equipment, the purchasing site will issue a number of their own choosing, e.g., 510-4-01-04.

A numerical log of purchase orders will be maintained by the Financial Resources Department. One copy of the purchase order must be attached to the paid bill. A second copy may be retained by the purchasing site for their records.

BIDS*

- A. Equipment purchase orders from \$100 to \$500 must be accompanied by at least three (3) bids. These bids may be secured by phone, catalogs, newspaper ads, and internet, etc. and will include a description of the item to be purchased, supplier name, the bid price, name of the salesperson, and the name of the employee securing the bid (recommended Phone Bid Form attached).

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PROCEDURES (Continued)

BIDS* (Continued):

- B. Equipment purchase orders valued over \$500 must be accompanied by at least three (3) written bids and will include a description of the item to be purchased, supplier name, the bid price, and the name of the salesperson (recommended Written Bid Form attached).
- C. Purchase orders valued over \$5,000 require competitive sealed bids with the time, place, and date for the opening of the bids.
- D. Office automation/computer equipment purchased for anticipated installation on the system wide mainframe computer is procured from Dell Computer Corporation. Therefore, the need to obtain other vendor bids is not necessary when purchasing equipment from Dell.
- E. Equipment purchased from a vendor with a statewide contract does not require bids. However, the purchase order will be annotated in the body of the order as follows: **"This purchase is from a vendor with a statewide contract"**.
- F. Further requirements concerning procurements are detailed under the contract with the Department of Behavioral Health and Developmental Disabilities.

*NOTE: Equipment purchases of \$100 or more must be included in an approved budget or revision.

ATTACHMENTS:

- 1. Recommended Telephone Bid Form
- 2. Recommended Written Bid Form
- 3. Memorandum regarding purchase of equipment from Dell
- 4. Critical Equipment Form
- 5. Computer Equipment Protocol
- 6. Inventory card/decal sticker
- 7. Steps for Depreciation