

# NEW RIVER COMMUNITY AND TECHNICAL COLLEGE

## PURCHASING PROCEDURES MANUAL

**JANUARY 1, 2008  
QUESTIONS CONCERNING INFORMATION LISTED  
IN THIS HANDBOOK  
ARE TO BE DIRECTED IN WRITING  
TO THE DIRECTOR OF PURCHASING.**

## **INTRODUCTION**

**THIS MANUAL WAS PREPARED BY THE COLLEGE PURCHASING OFFICE TO ASSIST ORGANIZATIONAL UNITS IN THE PROPER METHODS OF PURCHASING COMMODITIES AND SERVICES.**

### **OFFICE LOCATION MAIN CAMPUS**

**The Purchasing, Inventory & Receiving, and Supply-room are located in Room 02 Shott Physical Education Building. Phone 327-4039. FAX 327-4255.**

**The Purchasing Director is Paul Rutherford at (304) 327 4403 FAX (304) 327-4255**

**The Purchasing Assistant III is Lisa Neel at (304) 327 4520 FAX (304) 327-4255**

### **PURPOSE**

**The College Purchasing Office is committed to its role as a service organization as well as its dedication to the highest standard of purchasing practices. Its primary goal is to obtain goods and services of the best quality at the best price.**

### **AUTHORITY**

**The WV code vests the governing boards with the authority to effect purchases and acquire materials, supplies, equipment, services and printing for the State's colleges and universities. Authority is granted to the Governing Boards in WV code '18B-5-4 through '18B-5-8. NEW RIVER COMMUNITY AND TECHNICAL COLLEGE adheres to the revised Purchasing Regulations effective December 1, 1995 under Senate Bill No. 547 and Series 21 Procedural Rule, State College and University Systems of WV.**

**Only the President, or the VP Financial & Administrative Affairs may encumber funds for the institution. Any person who is not authorized to approve a purchase or contract, or who does so in a manner that is in violation of state law, or the rules, policies and procedures of the Governing Boards having jurisdiction, shall be personally liable for the cost of such purchase or contract. Purchases or contracts violating state law and/or the rules, policies and procedures of the Governing Board having jurisdiction shall be void and of no effect. Purchases are not considered approved until they have been processed through the finance system and a formal PO has been printed, approved and distributed.**

### **UTILIZATION OF SMALL, MINORITY & WOMEN-OWNED BUSINESSES RESIDENT IN WV.**

**All areas should encourage WV's small, disadvantaged, minority and women-owned businesses to participate in purchasing opportunities, by bidding them as often as possible.**

### **ETHICS IN PURCHASING**

**Purchasing in the public sector is a public trust and the highest degree of professional and ethical standards should be maintained at all times. WV Code '6B-1-1 et. seq., the Ethics Code, is applicable to all purchasing, receiving, inventory management, and surplus property activities performed under the jurisdiction of the Governing Boards.**

### **VENDOR ETHICS**

**Any vendor violating the WV Code or rules, policies and procedures of the Governing Board having jurisdiction or failed to meet required standards of earlier contracts may be suspended from the right to bid on or submit a proposal for institutional purchases for a period of up to one year.**

## **VENDOR REGISTRATION**

The WV Code requires that all vendors be registered with the WV Department of Administration, Purchasing Division, prior to receiving a purchase order for competitive products and/or services exceeding \$25,000. A \$125 annual vendor registration fee, payable to the State of West Virginia, is required from vendors receiving a purchase order for competitive products and/or services exceeding \$25,000 per order. Those exempt from paying the fee are vendors supplying sole source (non-competitive) products/services, or vendors receiving a purchase order in the aggregate amount of \$25,000 or less per order.

## **VENDOR PREFERENCE**

West Virginia vendors may claim an in-state resident vendor preference in accordance with ' 5A-3-37 of the WV Code on purchases of materials, supplies, equipment and printing that are competitively bid; however, this resident vendor preference is not applicable to construction, or for services. Except where provisions of ' 5A-3-37 may apply, the reciprocal preference provided for in ' 5A-3-37a of the WV Code shall apply to the purchase of commodities (materials, supplies, equipment, construction and services) and printing where appropriate. Claims for the resident vendor preference must be made in writing by the vendor and must be submitted with the vendor's bid.

There are specific policies and restrictions involved with the acquisition of goods and services for NEW RIVER COMMUNITY AND TECHNICAL COLLEGE. This handbook was designed to aid offices and divisions in the acquisition of such goods and services.

The purchasing office will not permit offices to walk purchase orders through the system unless a valid emergency exists. In these rare cases, a memo must be attached explaining why the order could not be processed in a timely manner and why this order is considered an emergency. Memo must be signed and approved by division or department head.(see emergency order)

All information in this handbook may be revised without prior notification. Revisions will be distributed as needed. Any variation from specified guidelines listed in this manual must be approved in advance, and will be put into writing prior to processing any order.

**1.0 BASIC INFORMATION**

- 1.1 PURCHASING DOCUMENTS: The forms you submit reflect on NEW RIVER COMMUNITY AND TECHNICAL COLLEGE, and the State of West Virginia, improperly prepared forms will be returned for correction. All forms submitted to the Purchasing Office must be *TYPED*, do not submit forms that have multiple strikeouts / corrections or are hand printed.
- 1.2 All non official forms must be pre-approved for use by the Purchasing Director.
- 1.3 Purchase Orders must be approved by the President/Vice President Financial and Administrative Affairs prior to authorizing a vendor to proceed with delivery of goods or service. A copy of the Purchase Order and all bid documents will be retained in the BSC Purchasing Office for public inspection and record.
- 1.4 The Purchasing office will not accept orders for items or services that have already been provided without prior approval. Orders will be returned to the office of origin.
- 1.5 All documentation must be neatly typed and approved prior to being processes.
- 1.6 All agreements must have a typed WV-48 and WV-96 attached that have been signed by the vendor. (Vendors are not permitted to fill out forms. Ordering office must complete for vendor to sign and date)

## 2.0 PROCUREMENT DOLLAR LIMITS

### 2.1 PURCHASE ORDERS UNDER \$25000.00 TO INCLUDE FREIGHT.

non-repetitive purchases under \$25000.00 do not require quotes. Employees are reminded that the funds they use are tax dollars and it is their responsibility to ensure that they are used cost efficiently. Each office is requested to obtain bids whenever possible. THE SPLITTING OF BIDS TO STAY WITH-IN THIS PRICE WILL NOT BE PERMITTED.

#### 2.1.1 INFORMATION IS REQUIRED WHEN OBTAINING BIDS:

The Vendor's name and address and phone number

The name and title of the individual quoting the price

The manufacturer and model number or description of the item(s) offered

The unit price and extended price for each item

The payment/shipping terms, shipping costs, and other applicable conditions

The quoted delivery date; and the signature of the individual quoting the price if the quotation is written by the vendor, or the signature of the person receiving and recording the phone quotation.

All faxed quoted will be put on a phone quote form prior to submission to purchasing for processing. When obtaining phone quotations use an approved telephone quotation form.

#### 2.1.2 When obtaining written quotations use only pre-approve Request for Quotations form.

The terms and conditions must be printed on the reverse of the form. The following information must also be included: Instructions for Quotations; Prompt Payment Act; and WV Resident Vendor Preference Certificate.

#### 2.1.3 After bidding, the order is to be **typed** on a pre-approved departmental purchase order form and forwarded for approval and typing. Documentation of all bids, bid evaluations and justification must be attached to the purchase order.

#### 2.1.4 PURCHASES OVER \$25,000

Orders over \$25,000 require formal written bids and formal state approval. The ordering office will submit a departmental Purchase Order with a recommended vendor and all necessary bidding information to Purchasing. The Purchasing Office will advertise in area newspaper(s) at the department's expense and obtain sealed written bids. All bids are to be mailed to the BSC Purchasing Office and the bid observer, where they will remain sealed until the bid opening date and time. Bids will be opened by the Purchasing Office staff in the presence of a witness on the date and time stated on the request for bids. After the bids are opened, they will be read aloud and open for public inspection. After the bid opening, the materials are photocopied and forwarded to the originating department for evaluation and recommendation for award. Once awarded, a purchase order is sent to Charleston for final approval.

#### 2.1.5 Normal turnaround time for requisitions over \$25,000 is thirty to forty five days. However, please try to submit your requisitions sixty days in advance of the time from which you want delivery of goods or services. Orders not submitted within the time needed to meet specific deadlines WILL NOT be given special treatment and will be processed within the routine purchasing time frame.

## **2.2 APPROVALS**

- 2.2.1 Individual preparing departmental PO must sign and forward document to budget supervisor/supervisor.
- 2.2.2 Supervisor must review document, verify six digit fund and organization number and forward to major administrator.
- 2.2.3 Major Administrator must review document, verify six digit fund and organization number and forward to Purchasing office for approval.

Document is then typed in final form and processed through the college's financial system and given final approval. Employees are reminded that a purchase order is not approved until it has been processed through the finance system, approved at every level and a formal Purchase order has been printed approved and released by the purchasing office.

## **3.0 SOLE/SINGLE SOURCE OF SUPPLY**

- 3.1 Sole source and single source procurement are not permissible unless the materials, supplies, equipment, and services needed are available from only one supplier. A requirement for a particular proprietary item does not justify a sole or single source procurement if there is more than one potential bidder for that item. A single source procurement is permitted only when the goods and services are of such a unique nature that they cannot be acquired from any other source. The following are examples of circumstances which could necessitate sole/single source procurement:
  - a. When the compatibility of equipment, accessories, or replacement parts is the paramount consideration:
  - b. The item is available from a state spending unit or other institution with preference under the West Virginia Code.
  - c. Where specific and unique items are called for on a grant or contract.
- 3.2 The determination as to whether a procurement shall be made as a sole/single source shall be made by the Director of Purchasing/CPO. In cases of reasonable doubt, competition should be solicited. Any request that a procurement be restricted to one potential supplier shall be accompanied by an explanation as to why no other will be suitable or acceptable to meet the need. An original signed price quote from the vendor, stating that the item or service is unique must also be attached to the Purchase Order.
- 3.3 Documentation requires for all sole source Purchases
  - a. An original signed and dated letter that includes a detailed quote that includes freight. This letter must be from the vendor explaining that they are the sole source vendor of the product and why.
  - b. A letter from the person placing the order explaining what research he or she did to determine that this is a sole source product and why they want to have the vendor considered a sole source.
  - c. A typed Departmental PO with all approvals and account numbers.

## **4.0 EMERGENCY PURCHASES**

- 4.1 Unforeseen needs that require the protection of human life and/or economic loss to government facilities may be processed through emergency purchasing procedures. Hardship situations created by improper planning or neglect will not be considered sufficient grounds for an emergency purchase. This type of purchase is rarely needed by any area other than the BSC physical plant. Contact the Director of Purchasing for information if you feel an emergency need exists.

Examples and other notes: A burst water main, an unsafe elevator situation, roof leak etc.

NOTE: POOR PLANNING IS NOT AN EMERGENCY.

## **5.0 CONTRACT PURCHASES**

- 5.1 NEW RIVER COMMUNITY AND TECHNICAL COLLEGE utilizes many different types of contracts. The contracts currently in use are from the State of WV Purchasing Division, West Virginia University, Marshall University, WVNET, Federal GSA, and other Higher Education agency Contracts. These contracts provide convenience and guaranteed pricing. With the exception of specific WVNET Contracts, bids are not required when purchasing from a contract. Examples: Paint, tires, lab supplies, paper, furniture and computers. Contracts are AVAILABLE ON LINE OR FROM in the BSC Purchasing Office.

- 5.2 When ordering from any contract, be sure to indicate the contract number and change order number, the item number, item description, unit and extended prices and page numbers. Purchase Orders not having this information will be returned.

- 5.3 AGREEMENTS : Agreements allow departments to purchase services that are unique or special in nature. Consultants, guest speakers, artists, accreditation services, laboratory services and inspection services are just a few examples.

### **5.3.1 AGREEMENTS LESS THAN \$25,000**

The AGREEMENT (WV-48) and ADDENDUM (WV 96) is used for all agreements. This type agreement does not require formal advertising in area newspapers but must be bid. After contract has been bid out and open for a minimum of 14 days the bids (three minimum) will be reviewed. If there not three attached bids, the agreement should be advertised in area newspapers for 2 days with a bid opening date 14 days after the ad is in paper. After three bids or greater are received the agreement form must be completed by the ordering office, signed by the vendor, attached to a departmental PO with the bids and processed through the system at least two weeks prior to the date of service. In addition to the AGREEMENT (WV-48), an INVOICE and a WV-96 is also required. If the Vendor is a full-time State employee, the certification statement at the bottom of the form must be fully completed and signed by their immediate supervisor. NOTE : All travel related expenses must be included in the base fee.

- 5.3.2 AGREEMENTS GREATER THAN \$25,000 This type agreement is processed by the purchasing office. Ordering office should send departmental PO with estimated price, recommended vendor and a detailed summary of what service is being requested. (Contact Purchasing for details)

### **5.3.3 ADDITIONAL AGREEMENT INFORMATION**

DO NOT SIGN ANY AGREEMENT FROM A VENDOR. Please forward them to the Purchasing Office along with signed Departmental Purchase Order, WV-96, WV-48 and

invoice. WV-48 and WV-96 forms must be completed and signed by vendor prior to submission.

- 5.3.4 TRAVEL REIMBURSEMENT FOR AGREEMENTS : When negotiating a contract for a consultant or artist all travel fees shall be included in the contract fee. Direct billing of lodging or other travel related expenses for consultants or artists are not permitted.

## **6.0 MAINTENANCE AGREEMENTS**

- 6.1 The ordering office shall request bids for all maintenance agreements over \$5000.00 per year. The BSC Purchasing Office will assist in the preparation of all maintenance agreements. The make, model, serial numbers, college tag number and name of the vendor supplying maintenance should be stated.

## **7.0 REPAIRS**

- 7.1 When equipment not covered by a maintenance contract is to be repaired by an outside vendor, the department must type a Departmental Purchase Order prior to bringing in a vendor. An estimate of the charges, the equipment serial number, college tag number, equipment location and contact person should be included on a typed Departmental Purchase order. When equipment is repaired off-site, the Purchasing department must be notified prior to equipment being taken off state property.

## **8.0 CANCELING PURCHASE/CHANGE ORDERS**

- 8.1 When a purchase order requires cancellation or a change, the department must type a letter to the purchasing office. The letter must clearly state what is being changed or canceled, the reason for change and complete account information. Only a division or department head may cancel an order.

## **9.0 CANCELING A REQUEST FOR QUOTATIONS**

- 9.1 Request for Quotations should only be issued when there is a valid procurement need, unless the solicitation states that it is for information purposes only. When a Request for Quotations is canceled, notice of cancellation shall be sent to all businesses solicited or known to have received a Request for Quotation.
- 9.2 The notice of cancellation shall : Identify the Request for Quotations, briefly explain the reason for cancellation, and when appropriate, explain that an opportunity will be given to compete on any re-bid or any future procurement of similar materials. The reason(s) for cancellation or rejection shall be sent to the Purchasing Office to be made part of the procurement file and shall be available for public inspection.

## **10.0 SOFTWARE PURCHASES**

- 10.1 All Computer software purchases of any price require prior approval from the Chief Technology Officer. Please obtain approval prior to submitting to purchasing .

## **11.0 COMPUTER / COMPUTER RELATED PURCHASES**

- 11.1 All computer hardware purchases require prior approval of the Chief Technology Officer,

or Computer Center Director. Contact the Computer Center for other necessary documentation and submit with all computer related purchases.

## **12.0 HOSPITALITY PURCHASE ORDERS UNDER \$5000.00**

- 12.1 Two weeks prior to an event, a departmental purchase order must be submitted to the Purchasing Office for processing. All orders must be itemized, indicate the date of the event, a brief justification and purpose of the event. A hospitality form must be attached to the order. A hospitality form must be properly completed and attached.
- 12.2 Hospitality orders over \$5000. See Director of Purchasing for details.

## **13.0 TELECOMMUNICATIONS**

- 13.1 To insure that all equipment purchased is compatible with existing equipment, all telecommunications purchase orders must have prior approval of the Vice President of Financial Affairs office prior to placing orders. This includes PCARD Purchases and replacement of existing equipment.

## **14.0 SPECIFICATIONS FOR BIDS**

- 14.1 The purpose of a specification is to serve as the basis for obtaining the commodities (products) and services suitable for the needs of the institution in a cost effective manner. Determining the exact requirements (specifications) for products and services to perform a given function is one of the most important tasks in the procurement process. A specification must describe the type of product or service, the quality level, special requirements in design, performance, delivery and usage. Specifications must not be restrictive and "lock-in/lock-out" a specific product, thus, limiting competition, or be so vague as to allow a vendor to provide a lower quality product or service.
- 14.2 A good specification is: Reasonable, legible, and clearly understandable to both the seller and the purchaser, clear and concise, identifiable wherever possible with some brand or specification already on the market.
- 14.3 A "brand name or equivalent" specification is based on one or more of a manufacturer's commodity or product description(s), model , part, and or number (s) and quality level(s). Commodity or product description must be sufficiently detailed and specify only the required features needed for the application. The description should contain the essential requirements that clarify the quality level or indicate the features that are important to the function of the item/service being purchased. The manufacturer's commodity or product number(s) must be easily identified and available in a current publication that is available to most vendors.

## **15. IMPROPER BID LANGUAGE**

- 15.1 Generally, the following language should not be included in a requisition:
- 15.1.1 "No substitutes@
  - 15.1.2 Only nationally known brands accepted;
  - 15.1.3 No alternatives will be accepted without prior approval of the institution.

## **16. BID AWARDS**

- 16.1 After competitive bids are received and properly evaluated, award shall be made to the lowest responsible bidder meeting specifications. A responsible bidder is one who has a

reputation for good performance, business, financial capabilities, and is able to furnish the required needs of the organization as requested. No personal preference shall be shown to any bidder, and "gold-plating" will not be permitted. "Gold-plating" is the adding of additional features or functions by a bidder to a specified requirement for which no original request was made, and then expecting an award (at more dollars) claiming the product or service is better than the lowest responsible bidder who meets the specified requirement.

- 16.2 If after a bid evaluation, an award is made to a vendor other than the lowest bidder, a thorough justification must be signed by the budget supervisor and attached to the order for public record and inspection. The reasons given must be technically correct and not based on subjective or prejudicial reasons. The justification must be signed by the evaluators and retained as part of the bid file.

## **17. REIMBURSEMENTS TO COLLEGE EMPLOYEES**

- 17.1 Since only the President and specifically approved individuals are the only individuals permitted to encumber funds of the college, reimbursements are discouraged. With the introduction of the PCard program, only in rare circumstances will there be a need to reimburse an employee for out of pocket expenses. Examples : a text book purchased while attending a meeting. Employees are reminded that they will only be reimbursed for valid college related expenses and should have approval prior to encumbering funds.

- 17.2 Required documentation:  
Official Itemized receipt from vendor including, item description, unit and extended cost. All receipts smaller than 8 1/2 X 11 must be attached to a a 8 1/2" X 11 sheet of paper.

Departmental Purchase Order with item description, unit and extended cost and justification for prior purchase.

Official BSC Invoice Itemized, with item description, unit and extended cost and justification for prior purchase.

State of WV Employee Reimbursement Form completed and signed.

## **18. INVENTORY**

### **18.1 PHYSICAL INVENTORY**

Once each year a physical inventory is to be taken of all offices and departments on campus. Detailed instructions will be sent to all Division Chairpersons and office heads attached to the current computerized inventory. Each division and office, with the exception of administrative offices, are responsible for taking their own inventory. Any problems or questions should be directed to the Inventory Director at extension 4403. The Purchasing office will maintain a formal database of all equipment \$5000 and greater.

### **18.2 BORROWING OR LOANING OF BSC EQUIPMENT**

- 18.2.1 NEW RIVER COMMUNITY AND TECHNICAL COLLEGE does not normally lend equipment to non-state/government agencies without prior approval. Prior to equipment being loaned a transfer/loan form must be completed and approved

- 18.2.2 Employees and/or students are not permitted to remove any equipment from state property. In the rare event that something is approved to be used off campus, the information is to be filed with the Inventory control office prior to removal from state

property. Items include but are not limited to: Computers, cameras, books, etc.

### 18.3 EQUIPMENT TRANSFER

18.3.1 No equipment may be moved from one room to another without processing a BSC transfer form. Transfer forms are available in the supply room at a nominal fee.

**Maintenance is not permitted** to move or pick up equipment without an approved form attached to the work order.

18.3.2 Properly completed transfer must include: item description, BSC tag number, serial number, model number, building room number, and approval of division or department head. Maintenance is not permitted to move equipment with out prior approval from the Purchasing office.

### 18.4 SURPLUS PROPERTY

18.4.1 All equipment disposal must be in accordance with the methods mandated by State code. Approval must be granted before actual equipment disposal is made.

18.4.2 No equipment or supplies purchased for or donated to NEW RIVER COMMUNITY AND TECHNICAL COLLEGE may be sold, given or thrown away by any division or office. Surplus items, include but are not limited to: obsolete, unusable, or un-needed items shall be turned in to the Inventory Office for proper disposal.

18.4.3 In order to surplus items, a memorandum must be sent to the Inventory office detailing each item or group of items to be surplus. Information must also be listed on a BSC transfer form. Transfer forms are available in the supply room at a nominal fee. A properly completed form must include: item description, BSC tag number, serial number, model number, and building and room number for items. Memorandum must have approval of division or department head, and major administrator's approval.

18.4.4 After surplus has been approved a copy of the transfer form will be returned to the department or division. Attach a copy of this form to a work order form and submit to maintenance for pick-up.

18.4.5 When surplus equipment that has cables attached, cables must be disconnected and bound up in a rubber band and put in a box prior to being picked up.

**MAINTENANCE IS NOT PERMITTED TO MOVE ANY EQUIPMENT  
WITHOUT A COMPLETED EQUIPMENT TRANSFER FORM.**

## 19. STOCK ROOM

19.1 The college stock room will maintain a stock of office supplies commonly being used in reasonable quantities; provided the product can be purchased and stored economically. Hours for receiving supplies from the stock room are posted. A properly prepared requisition must be submitted to the stock room clerk at the time supplies are to be picked up. Larger orders can be mailed to the Purchasing office in advance and picked up during stockroom hours. In the event a large need for envelopes or stationary is needed (over 5000) three weeks notice is needed to ensure that the items are in stock.

## 20. MAIL

20.01 No mail will be given out over the counter in the Mailroom.

- All personnel picking up mail must know box number and have key in order to get mail.
- 20.02 (Bluefield) All mail must be in the mail room prior to 3:00 PM to ensure it will be processed and sent out that day.
  - 20.03 (Conley Hall) The mail arrives in the Mailroom at 2:00 pm and is usually in the appropriate boxes by 2:30 am Mail should be picked up daily.
  - 20.04 Persons who are not associated with the Mailroom will not be permitted in the mailroom.
  - 20.05 Do not send campus mail in letterhead envelopes. Inter-departmental envelopes are available in the stockroom for this purpose.
  - 20.06 Do not seal standard size envelopes. (Bluefield Only)The postage machine does this for you. If you are mailing larger envelopes such as 6"X9", 10"X13" or 12" X 15" you must seal your envelopes.
  - 20.07 Your organizational account number must be listed on each piece of outgoing mail. Your mail will be delayed/returned if the number is not included.
  - 20.08 Prior to doing a bulk mail a representative of your campus must attend a mail seminar. (Bulk Mailings may only be mailed at the Bluefield campus at this time)
  - 20.09 No stamps are sold by Mailroom personnel.
  - 20.10 All envelopes must be bundled with a rubber band with flaps over lapped. Certified mail and envelopes larger than must be counted and envelope flaps must be sealed and bundled
  - 20.11 Employees are reminded that the college mail-room and receiving office is for institutional use only; no personal mail or packages should be sent to NEW RIVER COMMUNITY AND TECHNICAL COLLEGE. Personal packages or mail may be refused.

## 21. RECEIVING

When an order is received by a department the order is checked in and a receiving document is completed and signed. After form is completed the document is verified and sent to accounts payable for processing with the payment. It is the ordering office responsibility to have a receiving document completed, approved and forwarded to accounts payable.

## 22. COLLEGE COPIERS BSC MAIN CAMPUS ONLY

22.1 Locations: Copiers are located in each building and are for public and institutional use. Each copy cost \$0.05.

22.2 Employees are reminded not to use the copiers for extended periods of time (15 minutes and up). This practice is unfair to others needing to use the copiers. The copiers were not designed to be used in this manner. Excessive constant use/abuse of these units will cause them to break down and thus shorten their life expectancy. If you need to copy a high volume of material, **please plan ahead** and space out your coping needs to allow others to complete smaller copying needs. Items needing more than fifteen (15) copies, must be printed in the college print-shop.

### 22.5 INSTITUTIONAL COPIER CARD USE

22.5.1 For institutional use, an institutional copy card will be used and the cost of each copy shall be \$0.05. All questions regarding institutional copier cards should be referred to the Director Of Purchasing.

22.5.2 Each office wishing to buy institutional copier cards must fill out a copier card request form with the signature of the department/division head. Copier cards may be picked up from the Mailroom between 10:00 am to 12:00 and 12:30 to 1:40 PM.

22.5.3 Once a card has been issued, it is the responsibility of the card holder office/division to retain the card. Value and deposit on the lost card will not be credited.

## 22.6 PUBLIC COPIER CARD USE

22.6.1 In order to meet the needs of students, employees, and the general public.

Card Prices: Non-refundable Card fee; \$1:00 and \$0.05 per copy.

Card vending units will accept \$1:00, \$5:00, \$10:00 and \$20:00 bills for actual copies.

### **PRICE INCLUDES \$ 1.00 NON-REFUNDABLE CARD FEE**

Once the card value has been expended, the card must be returned to one of the new card distribution points to purchase a new card. No cash refunds will be given for copy cards returned. The cost of each copy shall remain at \$0.05 on the personal copier card. The cost per copy, on the business copier cards, will be 0.05. Students using their ID Card as a copier card will not need to pay the additional \$ 1.00 non-refundable card fee

### **STUDENT COPIER CARD DISTRIBUTION POINTS AND HOURS**

**CARD DISTRIBUTION IS AVAILABLE WHEN BUILDING ARE OPEN TO THE PUBLIC.**

**DICKASON HALL: TOP FLOOR CARD VENDING MACHINE**

**LIBRARY : CARD VENDING MACHINE**

**ONCE A NEW CARD HAS BEEN ISSUED, IT IS THE RESPONSIBILITY OF THE PURCHASER TO RETAIN THE CARD.**

## **23. 0 FORMS**

**Agreement WV-48:**

This is the standard form that may be used to set forth a simple

agreement between an institution and a vendor for services. Agreements of a more complicated nature may require an agreement written specifically for the services to be provided. A WV96 for must be signed by the vendor and attached.

**Departmental Requisition:**

This form is to be used to request the purchase of materials, supplies, equipment, printing and service. Only pre-approve forms may be used. This form is typed by the ordering office.

**Petty Purchase Order:**

This form shall be used authorize the vendor to provide the specified goods and/or services The terms and conditions are printed on the reverse side of the form. Note: This form is typed by the purchasing office.

**Purchase Order:**

This form shall be used to authorize the vendor to provide the specified goods and/or services over \$25,000. The terms and conditions are printed on the reverse side of the form. Note: This form is typed in the purchasing office and is submitted to Charleston for processing.

**Receiving Document:**

When an order is received in the receiving area the order is checked in and a receiving document is completed and signed. It is then sent to accounts payable for processing with the payment. In the event a department receives an item directly from the vendor it is the receivers responsibility to have a receiving document completed, approved and forwarded to accounts payable.

**Request for Quotations:**

This form is to be used when soliciting written quotations greater than \$1,000 but not exceeding \$25,000. The terms and conditions must be printed on the reverse side of the form. The following information must also be distributed to prospective bidders: 1) Instructions for Quotation; 2) Prompt Payment Act; and 3) WV Resident Vendor Preference Certificate.

**Request for Bids:**

This form will be used by the Purchasing Office when soliciting bids over \$25,000.

**Telephone Quotation:**

This form is to be used to record telephone quotes ( up to \$5000.00) and must be attached to the Purchase Order when submitting to the Purchasing Office for approval. Only pre-approve forms will be accepted.

**Prompt Payment Act**

The Prompt Payment Act of 1990 must be distributed to all prospective bidders. It shall be used without modification.

**Vendor Registration**

This form is used to register vendors with the State. Vendors receiving a purchase order for products and/or services exceeding \$25,000 per order must register and pay the annual registration fee.

**WV- 96:**

This form is used to protect the college from contract information that is not compliant to WV Code. Have vendor sign and submit with WV-48.

**WV Resident Vendor Preference Certificate:** The WV Resident Vendor Preference Certificate must be distributed to all prospective bidders. It shall be used without modification.

## **24.0 TERMINOLOGY**

**ADDENDUM:** A document used to add or delete information from another document. (Contracts, formal bids etc.)

**AGREEMENT:** A method of procurement involving the hiring of professional services.

**AWARDS OF CONTRACTS/ORDERS:** After competitive bids are received (over \$5000.00) and properly evaluated, award shall be made to the lowest responsible bidder meeting specifications. A responsible bidder is one who has a reputation for good performance, business, financial capabilities and is able to furnish the required needs of NEW RIVER COMMUNITY AND TECHNICAL COLLEGE. Vendors not meeting these guidelines should not be bid. Neither personal preference nor "gold-plating "(see gold plating below) is permitted. If an award is made to other than the lowest bidder, a thorough justification must be written and retained for public record and inspection. The reasons given must be technically correct and not based on subjective or prejudicial reasons. The justification must be signed by the evaluators and retained as part of the bid file.

**BACK-ORDER B/O:** Indicates that an order has been put on a temporary back-order, and item or order has not been canceled.

**CANCELLATION OF ORDERS:** If, for any reason, an order needs to be canceled, the Purchasing Office must be notified immediately. As a matter of course, a call should be made to the company involved explaining the problem. This alleviates problems with shipment and handling. The official cancellation papers are drawn by the Purchasing Office for purchase orders. Written notification from the originating department is required.

**CONFLICT OF INTEREST:** It is the responsibility of each college employee to take all appropriate steps to assure that the college does not knowingly enter into any purchase which could result in a conflict of interest in the situation.

**CONSULTING AGREEMENTS:** An agreement used to hire a company or individual to provide professional consulting. This type of agreement should be advertised whenever possible.

**DELIVERIES AND RECEIVING:** Deliveries of supplies and equipment shall be directed to the Purchasing Office. If items are large or heavy, they are to be directed to Maintenance. Once items have been received and checked-in they will be sent to the proper department or office. If merchandise is delivered directly to a department or office, please notify the Purchasing Office immediately and prior to the merchandise being put into use.

**EMERGENCY ORDERS:** Unforeseen needs require the protection of human life and/or economic loss to NEW RIVER COMMUNITY AND TECHNICAL COLLEGE facilities may be processed through emergency purchasing procedures. In these rare cases a memo needs to be attached explaining why the order could not be processed in a timely manner, and why this order is considered an emergency. The memo must be signed and approved by the division or department head. The order is processed in the same manner as a regular order, but will be walked through the system. Bids will be obtained and documented. **Hardship situations created by improper planning or neglect will not be considered sufficient grounds for an emergency purchase.**

**EMERGENCY PURCHASES:** The Director of Financial and Administrative Services may authorize offices to purchase commodities or services for bonafide emergencies. In all cases, copies of the bids and a full account of the circumstances of the emergency contained in a letter

of justification from the agency head must be submitted to the Purchasing Director. Hardships created by neglect or poor organization and planning will not be considered sufficient grounds for utilization of the Emergency Purchase Order.

**FOOD SERVICE:** A formal purchase order must be processed prior to any food service orders being placed with the contract food service vendor. (Mountain Vending) No outside food service vendors shall be permitted to operate on the campus without the written permission of the Vice President of Financial and Administrative Affairs. All food service orders must be processed three weeks prior to event and coordinated by the food service coordinator.

**GOLD PLATING:** The adding of additional features or functions by a bidder to a specified requirement for which no original request was made, and then expecting an award (at more dollars) claiming the product or service is better than the lowest responsible bidder who meets the specified requirements.

**HOSPITALITY:** Food, decorations, flowers, non-alcoholic beverages, and related expenses for the reception of guests by the institution for a specific event or function. Hospitality forms are needed for each purchase, and the PO must be clearly itemized and contain the date, purpose and justification for function. See the Director of Purchasing for more information.

**INVENTORY:** All college equipment is under Inventory Control by tag number, location and serial number. Before moving any equipment from one location to another (rooms, Divisions, campuses), it should be reported to Inventory Control by using an equipment transfer form. Inventory is defined as all items that have a unit cost of \$1000.00 or more, **or has an expected life of one year.** Items that have a life or value less than these guidelines may be tagged at the discretion of the Director of Purchasing. All items \$5000

**INVOICES:** Any invoice sent directly to ordering office must be sent to the Business Office immediately. Upon receipt, a copy of the invoice will be sent to the ordering office for review. If invoice is not returned within one week, the business office will process the invoices for payment. If a department or office should receive a copy of an invoice that is for items that have not been delivered, office must contact the business office to stop payment on that invoice.

**ITEMIZED INVOICE:** An invoice that breaks down the expenditures in a manner that it can be clearly understood. All invoices shall be itemized prior to submission to the purchasing office. All non itemized invoices will be returned. Included in this area is reimbursements. Both the BSC invoice and the proof of payment shall be itemized.

**MAINTENANCE AGREEMENTS:** A contract to provide equipment maintenance as needed to properly protect and maintain college-owned equipment. Such agreements are restricted to a specific period of time and for a specific fee for specific items. These agreements are to be entered into, only, with prior approval of the administration. (Contact the Purchasing office)

**NO BID:** A "no bid" is not considered a valid bid. A "no bid" is an attempt for a bid only. Ordering offices shall send out more than three bids to insure that three valid bids are returned. Any abuse or manipulation of phone bids may result in ordering office having to formally bid out all orders. By law all vendors must have an equal opportunity to bid.

**OR EQUAL:** By law, all QUOTATIONS (phone and written) must include the statement "OR EQUAL" after each item.

**PERSONAL PURCHASES / MAIL:** The college does not enter into any negotiation or become

involved in any transaction for the purchase of anything for the personal use of the college administration, staff or faculty. Employees are reminded that the college cannot accept any personal packages or mail. Arrangements must be made to insure that such personal mail and packages are not delivered to the campus.

**PROMOTIONAL EXPENSE:** Expenditures by the institution for display booths, promotional items at trade shows or similar events, promotion or exposure of service(s) providing enhancement of institutional image.

**PUBLIC RELATIONS:** It is the desire of NEW RIVER COMMUNITY AND TECHNICAL COLLEGE to strive for the best possible public relations between the college community and all vendors soliciting and/or providing service to the college. All employees are reminded that they represent the college and should keep the college's community relations in mind.

**REIMBURSEMENT:** In the event an out of pocket expense occurs to an employee, NEW RIVER COMMUNITY AND TECHNICAL COLLEGE has a procedure to reimburse the employee. See section

**REPETITIVE ORDERS:** Repetitive orders for identical or similar items must be bid at any dollar amount. Splitting orders to stay within dollar limits will not be tolerated. Split orders will be returned to ordering office.

**SERVICE CONTRACTS:** A vendor that supplies professional services. WV 48 and WV 96 forms must be filled out by the ordering office, mailed to the vendor for signature and attached to a PO prior to submission.

**SHIPPING TERMS:** Ordering offices shall request F.O.B. DESTINATION, FREIGHT PREPAID on all bids. If vendors provide a bid other than requested see list below for comparison.

<b>F.O.B. ORIGIN/SHIPPING POINT FREIGHT PREPAID</b>	Seller pays freight charges Seller bears freight charges Buyer owes goods in transit Buyer files all claims
<b>F.O.B. ORIGIN/SHIPPING POINT FREIGHT COLLECTED</b>	Buyer pays freight charges Buyer bears freight charges Buyer owes goods in transit Buyer files all claims
<b>F.O.B. ORIGIN/SHIPPING POINT FREIGHT PREPAID &amp; ADD</b>	Seller pays freight charges Buyer bears freight charges Buyer owes goods in transit Buyer files all claims
<b>F.O.B. DESTINATION FREIGHT COLLECT</b>	Buyer pays freight charges Buyer bears freight charges Seller owes goods in transit Seller files all claims
<b>F.O.B. DESTINATION FREIGHT PREPAID</b>	Seller pays freight charges Seller bears freight charges Seller owes goods in transit Seller files all claims
<b>F.O.B. DESTINATION FREIGHT COLLECT &amp; ALLOWED</b>	Buyer pays freight charges Seller bears freight charges

Seller owes goods in transit  
Seller files all claims

**SOLE SOURCE VENDOR:** A vendor that provides a specific commodity or service that cannot be supplied by any other vendor.

**SPECIFICATION CONSIDERATIONS:** The Purchasing office will assist, when requested, in formulating specifications. The final decision on proper specifications on purchases is a joint responsibility and requires the approval of the requisitioning unit and the Purchasing office. It is mandated by state law that all agencies submit specifications on bid documents in a manner which will permit fair and equitable consideration from all vendors qualified to meet the college requirements. In the event that an items specifications are questioned, the Purchasing Director shall consult with administrative officers, divisional chairpersons, competent specialists, or secure such technical assistance, as is required, to determine fair specifications as needed.

**SPECIFICATION DESCRIPTION DEFINED:** A clear and accurate description of the physical, functional, performance characteristics, nature of the materials, supplies, services, equipment, or printing to be purchased. A specification includes, as appropriate, requirements for inspecting, testing, or preparing commodity for delivery. Any attempt to circumvent the bidding process by restricting bidding, locking in or out vendors will not be tolerated. A model and brand may be listed but words (OR EQUAL) must follow description.

**STOCK ROOM:** The college stock room will maintain an inventory of office supplies commonly being used in reasonable quantities; provided the product can be purchased and stored economically. Hours for receiving supplies from the stock room are posted. A properly prepared requisition must be submitted to the stock room clerk at the time supplies are to be picked up. Larger orders can be mailed to the Purchasing office in advance and picked up during stockroom hours. In the event a large need for envelopes or stationary is needed(over 5000) three weeks notice is needed to ensure that the items are in stock.

**TELEPHONE SERVICE:** Any requests for service or telephone problems, will be handled through the office of the Vice President of Financial and Administrative Affairs. All repairs or alterations shall be directed to this office at extension 4048.

**TIE BIDS:** Occasionally, more than one vendor may offer the same price or a product or service thus resulting in a tie bid. If the order cannot be feasibility split, and multiple awards are not made, the tie bid(s) situation must be resolved. The preferred method for resolving tie bids is "Last and Final Offer". The parties to the tie must indicate, in writing, their last and final offer which can be no higher than the tie bid price or amount. If possible, this should be done with the parties to the tie bid(s) being assembled at a specified time and place. However, a sealed offer, similar to a sealed bid may be used to accommodate vendors whose geographical location is distant from Bluefield. The lower/lowest of the "Last and Final Offer" bids will be awarded the order/contract. Other methods such as a flip of a coin or draw of cards may be used to resolve tie bids in the event the preferred method is not practical. Tie bids will be decided in cooperation of the purchasing office. Flip of the coin or draw of cards will be done in the Purchasing office only.

**TRAVEL:** Please refer to the travel regulations booklet for the State of West Virginia. No travel is to be included as part of an agreement. Vendor shall pay all hotel bills and meals themselves and the price shall be included in the contract price..

**VENDOR:** A vendor is any individual, company, or corporation providing goods and/or services

to state agencies that will require a check or a monetary transfer to occur.

**VENDOR COMPLAINTS:** From time to time, problems develop concerning vendor performance. To resolve these problems it is necessary to have complete documentation of the situation in writing before proper action may be taken to correct the situation. Without adequate communication on vendor performance, quality, and delivery, the Purchasing office will continue to use vendors who have proven to be unsatisfactory. By providing Purchasing with written performance reports, unsatisfactory vendors will not be used. Problems concerning vendor performance should be directed to the Purchasing Director at (ext. 4403). In the event the vendor is unable to rectify the situation, a Vendor complaint form may be filled out by the Purchasing Director. The vendor must be contacted about any problems before a complaint form may be processed by the college.

**VENDOR REGISTRATION:** The West Virginia Code requires that all vendors be registered with the West Virginia Department of Administration, Purchasing Division, prior to receiving a purchase order for competitive products and/or services exceeding \$25,000 from the Commission, the Governing Boards and their institutions. An annual vendor registration fee, payable to the West Virginia Department of Administration, is required from vendors who have received a purchase order for competitive products and/or services exceeding \$25,000 per order. Those exempt from paying the fee are vendors supplying sole source (noncompetitive) products/services, or vendors receiving a purchase order in the aggregate amount of \$25,000 or less per order.

**VIOLATIONS:** Purchasing products and services for State government is a public trust. The highest degree of discretion and ethical behavior is demanded of all parties participating in the purchase and sale of products and services. Any person who authorizes or approves a purchase violating the West Virginia State Code, regulations, policies or procedures (adopted by the Purchasing Division) shall be personally liable for the cost of the purchase. Purchases violating the above shall be void and of no effect. Vendors violating the above provisions may be suspended by the Purchasing Director from the right to bid on purchases of commodities and services for a period of up to one year. Any person who receives anything of more than nominal value from a known interested party in the awarding of a purchase order or contract shall be subject to penalties of the West Virginia State Code.