

To: Physical Plant Staff

From: Jim Blumberg, CPE

Date: 12/2/2013

Subject: Physical Plant Procurement Policy

The following document establishes the Physical Plant Procurement Policy.

1. Materials Purchases:

a. Purchases **under \$1,000:**

- i) Purchases made at a local Vendor Site can be made using the Work Order Number (WO#) if the item is picked up by Physical Plant staff
- ii) A Purchase Order (PO) is required when ordering an item that will be shipped to the Physical Plant loading dock.

b. Purchases **between \$1,000 and \$3,000:**

- i) A PO is required for all purchases

c. Purchases **between \$3,000 and \$20,000:**

- i) A PO is required. Three (3) quotes are also required.
- ii) All POs over \$3,000 require the approval of the Director.

d. Purchases **over \$20,000:**

- i) A Request for Bids (RFB) is required. Three (3) quotes are required. The final PO requires the approval of the Director.

2. Services:

a. Emergency Repairs:

- i) Repairs requiring immediate completion to maintain heating, cooling, domestic water, electrical services, kitchen equipment, etc.
- ii) Vendors may be called directly. However, the following guidelines apply:
 - I) Vendors must have a signed Trades Agreement for the current FY
 - II) Vendors must have a current insurance certificate on file with the Physical Plant
 - III) Vendors shall troubleshoot the issue and provide at least a verbal estimate before providing final authorization to complete the work. **Repairs over \$3,000** shall be approved by the Director if practicable.
 - IV) Emergency repairs can be authorized using the WO#.

b. Planned Work:

- i) Work shall be planned whenever possible.
- ii) Vendors must have a signed Trades Agreement for the current FY.
- iii) **Projects under \$3,000** – A PO must be used. Multiple quotes are not required.
- iv) **Projects between \$3,000 and \$20,000** – Three (3) quotes are required. A PO must be used and must be approved by the Director.

c. Large Capital Projects, **Over \$20,000**:

- i) The Construction Project Agreement Form must be used as part of the Request for Proposal (RFP) process.
- ii) All projects of this size require three (3) proposals in sealed envelopes.
- iii) A signed certificate of insurance must be on file in the Physical Plant.

d. Additional Requirements:

- i) All material and contractors costs must be associated with a WO#. Materials purchased for stock (inventory) shall either be entered into Inventory Direct or shall have pricing information listed on the packaging for future use. Small cost items are excluded from this requirement.
- ii) Items requiring three (3) bids must be included on an Expenditure Request form and sent to the Director for approval.

DEPARTMENT: _____ DATE: _____

1. SCOPE OF WORK (WHAT IS BEING PROCURED):

2. JUSTIFICATION (WHY IS PROCUREMENT NECESSARY):

3. PROPOSED COST \$ _____

VENDOR _____

*Expenditures of \$3,000 or above require three (3) quotes, attach all three quotes

*Expenditures of \$20,000 or above require an RFP

ALTERNATE PRICING:

ALTERNATE PROPOSED COST \$ _____

VENDOR _____

ALTERNATE PROPOSED COST \$ _____

VENDOR _____

4. TIMING IMMEDIATE THIS FY NEXT FY

5. Approved Rejected Director _____