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ADMINISTRATIVE RULE

Rule Number/Name:	o6o.oo6.ooo – Purchasing and Procurement
Responsible Department:	Business Office
Authority:	Chief Financial Officer

Overview

Columbia Gorge Community College is dedicated to providing necessary supplies, equipment and services in a manner that encourages competition without prejudice and to maximize educational value for every dollar expended. Commonly used items will be standardized whenever consistent with educational goals and in the interest of efficiency or economy. Columbia Gorge Community College requires purchase orders for expenditures for goods and services. A purchase order chain of approval system is in place to assure compliance. Vendors may accept approved College purchase orders. Vendor accounts are established by the Chief Financial Officer.

Applicability

ORS 279A.075: Unless otherwise provided in the Public Contracting Code, the exercise of all authorities in the code may be delegated and sub delegated in whole or in part. Notwithstanding delegations of authority under this section, a person's or agency's exercise of the delegated authority is governed by the code and rules adopted under the code.

Participating Oregon Community Colleges These Community College Rules of Procurement (CCRP) were drafted through a statewide, collaborative effort by representatives of Participating Oregon Community Colleges (POCC). Pursuant to the POCC participatory agreement, Sections 100 and 200 of the CCRP shall remain unchanged unless modified by the POCC at a later date and subsequently ratified by each institution's Local Contract Review Board. Any member of the POCC that adopts changes to Sections 100 and/or 200 of the CCRP that have not been mutually agreed upon and adopted by all other POCC members shall by and through its actions, no longer qualify as a member of the POCC cooperative procurement group and shall not represent itself as such.

Administrative Rule Statement

All procurement on behalf of Columbia Gorge Community College shall be executed in accordance with the requirements of Public Contracting Code 279A.050 (Procurement



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Authority), 279A.055 (Personal Services Contracts), 279A.060 (Local contract review Boards), 279A.070 (Rules) and Community College Rules of Procurement adopted March 15, 2005 by the Local Contract Review Board. The various thresholds for "formal" or "sealed" public bidding shall remain in compliance with these regulations as they may be amended from time to time. Where federal procurement regulations apply and are more restrictive than the state regulations, the federal regulations shall prevail.

Sustainability Commitment- In accordance with the Oregon Community College Rules of Procurement, member colleges are committed to the use and purchase of environmentally and socially responsible materials and products, which are fiscally responsible, reduce resource consumption and waste, perform adequately, and promote human health and well-being. Recognizing their regional economic role, colleges shall seek opportunities to educate, encourage, and influence their respective markets by utilizing, where feasible, products and services, including new environmentally preferable products, reusable products, recycled content and recycled products.

Interpretation of Administrative Rule

Accounting Specialist III – Accounts Payable

Cross Reference to Related Administrative Rules

1. AR 040.034.000 - Use and Sale of Instructor Authored Materials
2. AR 090.004.000 – Requests for Proposals, Solicitations for Applications and Other Grant Opportunities
3. 050.002.000 - Cash Management
4. Green Purchasing Policy, Code LA, Adopted 05/10/2011

Further Information

Accounting Specialist III- Accounts Payable
Email: accountspayable@cgcc.edu (541) 506-6053



Authorized limits

The procurement method selected is primarily based upon the size of the transaction. Individuals that have been delegated authority to purchase should do so within the following limits.

- Micro-Purchases:
 - All purchases over \$1,500 should be pre-authorized through the official procurement process and secure the required approvals prior to purchase.
- Deans or Directors have limited approval authority of \$2,500. Purchases over \$2,500 require Vice President approval. Small-Purchases: Purchases over \$4,999 require a minimum of three (3) documented quotes (See Splitting Orders/Fragmenting below) in addition to Vice Presidential approval. The purchasing specifics should be entered onto form P-1 "Procurement Process Documentation Form (\$5,000+) "and submitted with the quote documentation when entering the PO into the accounting system for approval. Equipment and capital improvements over \$5,000 should be reported as capital assets scheduled regular depreciation.
- Formal Procurements: Pursuant to Board Policy BP 6330, purchases over \$75,000 require Board approval and may require formal bid processes.

The accounting system may require additional purchasing approvals for coding and coordination in excess of this policy.

All purchases must follow the formal Purchase Order (PO) process executed and be recorded within the accounting system to ensure appropriate recording and tracking of the expense. A PO is a formal document approval resulting in payment upon receipt of an approved invoice and acknowledgement of receipt of goods or services. Purchase Orders should be entered and approved prior to the purchase any item exceeding \$2500 (including those on credit cards) and not entered after the receipt of an invoice as this circumvents the objectives of the approval process. In addition, documentation of the supplier's quotation and any other important communication should be uploaded along with the purchase order.

Purchase card (P-card) is routinely used to purchase goods or services prior to receipt, it is the responsibility of the cardholder to ensure receipt of the goods and maintain documentation of the receipt in the event of an audit.



Check Policy

Payment is made for received goods and service upon submission of an invoice or expense receipt matching the terms of an authorized purchase order. Invoices and receipts should acknowledge receipt of goods or services by a college representative.

Original receipts or invoices are required for payment or reimbursement. For reimbursement or payment of expenses where a receipt is not present an approved Check Request Form is required. Expect internal process time of 7 to 14 days to process check payments.

New vendors

Prior to making purchases confirm an existing purchase relationship exists with the vendor. Recognized vendors are listed within the procurement system. If a vendor is not listed purchaser will be required to provide a current W9 from the vendor and work with the Accounts Payable Specialist to set up the vendor. This does not apply to purchases made by p-card.

Grants Funded Procurements

Many grants have special procurement rules and guidance in addition to federal (2 CFR 200) and state regulations. Purchaser are encouraged to contact the grant administrator, grant accounting coordinator and/or refer to the specific grant agreement for guidance prior to proceeding in order to ensure compliance with all applicable rules. Procurement for grants or other non-general fund expenses are not exempt from bidding or other procurement rules. Federal grants can have additional requirements beyond Oregon law regarding documentation, competition, affirmative action, small business involvement, etc. As a result, purchasers and grant administrators need to be aware of the individual grant requirements when making and approving purchases.

Statewide Price Agreements/Contracts

As a member of the Oregon Cooperative Procurement Program we have access to hundreds of competitive Oregon State price contracts for a wide variety of goods and services. Check with Purchasing to see if there is a price agreement that could save the college money on the procurement.



Software and Technology

All software and technology purchases must be either sourced through the Information Technology (IT) department or approved for direct purchase prior to purchase. Email authorization will be required documentation to accompany any software or technology purchased by a department other than IT. Software and technology procurement have unique security, compatibility, and warranty concerns.

Additionally, we seek to benefit from bulk or shared licensing at contracted or educational pricing whenever possible. The IT department is best positioned to evaluate purchases for compatibility and appropriateness to avoid duplication of similar licensing across campus. Standard processing time for technology or software requests require a two week notice in addition to fulfillment timelines. Software and technology installations are subject to the cybersecurity policies of the college.

Facilities or Construction Services

Purchases that may require changes to the physical space or utilities must be reviewed with and approved by the Facilities department prior to purchase. Costs required for any physical changes to the building are considered a part of the purchase cost and are the responsibility of the purchaser. For example, an individual purchase that requires a change to the building infrastructure may incur additional cost exceeding Dean or Director approval authority and require Executive approval.

Food

The Hook Café has first right of refusal for all food catered on campus. If the department or group is hosting an event on campus the purchaser must provide the Hook Café with the first opportunity to cater the event. This includes food purchased for resale, internal use, or the general public. Meals or food purchased with college resources should be for an approved official function or event. **Alcohol cannot be purchased using college funds.**



Green Purchasing

The goal of this policy is to reduce environmental impact by buying goods and services from manufacturers and vendors who share our commitment to the environment and sustainability. Green purchasing assigns environmental and social considerations as having equal weight with price, availability and performance in college purchasing criteria.

Obtaining Bids or Quotes

Obtaining bids or comparative quotes is a preferred practice to ensure an approximation of the pricing and services to be received. Quotes should be for equal or like products including variables such as shipping or delivery charges and any educational discounts available. Staff shall use care and discretion when obtaining quotations from vendors (e.g., pricing shall NOT be obtained for the purposes of leveraging deeper discounts—department staff are strictly prohibited from sharing vendors' quotations with competing vendors). This practice is unethical, biased, and unequivocally unacceptable.

The bid process is a formal and documented process required for purchases over \$75,000 conducted only by designated procurement agents (BP 6340).

Contracts

Pursuant to CGCC Board policy BP 2430 and BP 6150 signature authority for any contracts or agreement is given to the President of the college. Employees cannot sign contracts or agreements on behalf of the college.

Sole Source Purchases

Pursuant to ORS 279B.075 determination of a sole source is based upon written findings in accordance with the provisions set forth in ORS 279B.075. APPROVAL must be obtained for a sole source purchase. Contact Purchasing for assistance.

Splitting Orders/Fragmenting

Splitting orders of like items or portions of a project with intent to circumvent competition or exceed one's delegated authority is prohibited (ORS 279B.065, 279B.070). Purchase should not be split between different funding sources without prior approval.



Public Records and Documentation

It is important that all documentation related to purchasing is sent to the business office and properly retained by the department purchasing. Pursuant to CGCC Board Policy PB 3300 and Oregon Revised Statutes, procurement documents are considered public record.

“Public record” means any writing containing information relating to the conduct of the public’s business that is prepared, owned, used, or retained by a public body regardless of physical form or characteristics, including, but not limited to, handwriting, typewriting, printing, photographing, and every means of recording, including letters, words, pictures, sounds or symbols, or combination thereof, and all papers, maps, files, facsimiles, or electronic recordings.

Note: Contact Human Resources for any Public Records Request.

Miscellaneous

Personal services are expenses categorized as individuals performing services for the college. Caution should be used when pursuing expenses for personal services to avoid incurring substantial tax penalties and other liabilities. APPROVAL MUST BE SECURED BEFORE COMMENCEMENT OF SERVICES.

Vendors are encouraged to contact college personnel in an attempt to market their products; however, caution should be exercised by college staff to ensure the college is not committed to the purchase of any product or service without first following the procurement requirements illustrated in this handout.

Any inadvertent personal purchase must be immediately reported to Accounts Payable Specialist and reimbursement to the college should be made within 48 hours of discovery.

Avoid making purchases from foreign vendors. Foreign purchases can result in shipping delays, additional taxes, warranty, and return challenges.



Appendix

Community College Rules of Procurement CCR.102:

Purpose and Statutory Authority. These Rules are authorized by Public Contracting Code 279A.050 (*Procurement Authority*), 279A.055 (*Personal Services Contracts*), 279A.060 (*Local Contract Review Boards*), and 279A.070 (*Rules*). All references to PCC shall mean Public Contracting Code as defined in ORS 279A.010 (1)(bb). (*Note: Under ORS 279A.065(4), public contracting agencies in Oregon will be operating under the State of Oregon Attorney General's Model Rules unless they have taken special action to opt out and adopt their own contracting rules.*)