

	<p style="text-align: center;">POLICY & PROCEDURE MANUAL</p> <p style="text-align: center;"><u>Associated Students of</u> <u>California State University</u> <u>Channel Islands, Inc.</u></p>	<p style="text-align: right;"><i>Policy No.: ASI 9.0</i> <i>Number of Pages: 1 of 3</i></p>
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Policy on Procurement

Policy: This policy applies to the purchase of materials, equipment, supplies and services paid from the California State University Channel Islands (CSUCI) auxiliary, Associated Students of California State University, Channel Islands, Inc., (ASI), administered funding sources. This policy blends efficient business practices and governing policies that satisfy the requirements of federal, state and independent auditors. Travel, retention of artists, entertainers, catering and speakers are not subject to the provision of this policy.

ASI must approve all purchase orders prior to commitment; accordingly, a request for goods and services must be submitted to ASI prior to making purchases within the guidelines of this policy and procedure.

- A. Purchases shall be made in a manner that supports a competitive bidding process and at the lowest cost consistent with quality, specifications, service and product availability.
- B. Fitness and quality being equal, recycled products shall be considered for procurement in place of non-recycled products, whenever such products are available at not more than the cost of their non-recycled counterparts.
- C. Volume or pool purchase, annual purchase agreements and State Purchasing contracts may be utilized when deemed to be advantageous to ASI.

Purchase Order Request Process:

- A. Purchasing materials, equipment and supplies from one vendor with a total cost (excluding shipping, handling, tax and freight) that exceeds **\$1,000*** should be requested using the CSUCI ASI Request for Goods and Services (RGS) form with the exception of travel, retention of artists, entertainers, catering and speakers.
- B. Once the goods have been identified, the purchase should be evaluated to determine if competitive bids are required based on the following guidelines.

Guidelines for Purchase of Materials, Equipment & Supplies:

****Materials, Equipment and Supplies under \$10,000***

The authorized signer is required to submit an ASI Request for Goods and Services (RGS) with one price quotation from the vendor in order for Procurement to issue a purchase order.

****Materials, Equipment and Supplies over \$10,000***

The authorized signer is required to submit an ASI Request for Goods and Services (RGS) with a minimum of three price quotations attached from vendors in order for Procurement to issue a purchase order.

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Materials, Equipment and Supplies over \$50,000

The authorized signer is required to submit an ASI Request for Goods and Services (RGS) and Procurement can help obtain three formal bids from providers based on written specifications, which recognize competitive pricing, responsiveness to specifications, and reputation of vendors. Procurement will complete the bid process and issue a purchase order.

Guidelines for Purchase of Services:

****Services under \$50,000***

The authorized signer is required to submit an ASI Request for Goods and Services (RGS) with at least one or more bids from providers based on written specifications, which recognize competitive pricing, responsiveness to specifications, and reputation of vendor(s). Procurement will issue a service order or contract. Insurance shall be required for services that are to take place on the campus property.

Services over \$50,000

The authorized signer is required to submit an ASI Request for Goods and Services (RGS) and Procurement can help obtain a minimum of three formal bids from providers based on written specifications, which recognize competitive pricing, responsiveness to specifications, and reputation of vendors. Procurement will complete the bid process and issue a service order or contract. Insurance shall be required for services that are to take place on the campus property.

****Excluded from formal competitive bid process are those thresholds indicated by asterisk above, as well as:***

Sole source purchases on a non-competitive basis will require written justification and approval. The sole source written justification should include:

- A. Unique performance factors of the products/services specified,
- B. Why the factors are required,
- C. What other products have been evaluated and rejected and why

Food service and other event-related items. These purchases may be made upon the basis of a single quote from a reliable and convenient source of supply as determined by the authorized signer; however, quotes from multiple vendors may also be considered for the same event. In any case, travel, retention of artists, entertainers, catering and speakers are allowable as direct pay. A more formal procurement process adds little value to these types of transactions. However, award shall be made on terms most advantageous to ASI based on quality, price, service and delivery.

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Retention of service contractors should generally be on a time and material basis. Professional liability insurance may be required of service contractors depending on the nature and location of the services rendered. Authorized signer's approval must be obtained prior to the retention of service contractors.

Conflict of Interest: No ASI Board member, employee, or CSU employee shall personally derive any benefit or gain or receive preferential treatment related to the purchase of equipment, supplies or services for ASI.

SBE/DVBE/MBE/WBE: Some funding agencies may require the use of a process that affirmatively seeks bids from small business enterprises (SBE), disabled veteran owned business enterprises (DVBE), minority owned business enterprises (MBE) and/or women owned business enterprises (WBE). The ASI Project Director is required to seek such bids if specified in the award.

Restrictions: The purchase of materials, equipment, supplies and services are subject to the following restrictions:

- A. The purchase must be a reasonable, allocable and allowable charge.
- B. Equipment purchases are generally secured using a purchase order to ensure proper handling, warranty (where appropriate), and recording for inventory purposes. If equipment is purchased and then submitted on a check request for reimbursement, ASI has the discretion not to approve the purchase if proper information is not received or proper bidding procedures were not followed.
- C. Hazardous materials must be secured using a purchase order to ensure proper handling of the substances and University notification and approval.

Approved by the ASI Board on March 3, 2005:

Melissa Mirkovich, Chair