

Purchasing/Equipment Procedures Handbook

Purchasing/Equipment Department

Mission Statement

The Purchasing and Equipment Department represents the college in the purchase of goods and services at the most favorable prices, terms and conditions to support the instructional programs and administrative services of the institution (Purchasing/Equipment Department Personnel, n.d.).

The above mission statement is set forth by the Purchasing/Equipment Department and approved by the college, but it is in no means the only focus of the Purchasing/Equipment Department. This department supports all aspects of the college including disposal of property and reissuing property across the college campuses, tracking assets, overseeing the transfer of equipment, entering new equipment, and bidding out surplus property.



ALLMAN CENTER
BUSINESS SERVICES DIVISION
FORSYTH TECHNICAL COMMUNITY COLLEGE

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Purchasing/Equipment Procedures Handbook

Purchasing Procedures

1. Office and Instructional Supplies

Many commonly used office and instructional supplies are available in the Faculty/Staff Service Center. Requisitions for supplies containing supply items carried in the Faculty/Staff Service Center will not be processed unless a written justification is attached explaining the necessity for ordering from another source. If other office supplies are needed and are not available in the Faculty/Staff Service Center, each division has persons authorized to participate in the State Term Contract for electronic office supply ordering. **Supply orders should be combined at the divisional level until orders total a \$100 minimum order.**

2. Requisitions

The General Statutes of North Carolina, the Division of Purchase and Contract, the Department of Community Colleges, and Forsyth Tech all regulate purchasing procedures. The procedures must be followed in order to purchase supplies, materials, equipment, or to obtain services, regardless of the fund source. Specific questions should be referred to the Purchasing/Equipment Department or the Vice President of Business Services. Training programs for employees in purchasing procedures or use of the Division of Purchase and Contract are available through the Purchasing/Equipment Department.

Supply items are expendable and inexpensive. Equipment items are non-expendable which can be repaired, and that represent an investment of money. Equipment may be minor at less than \$1,000 per item or major at \$1,000 or more per item.

A. Purchase of Term Contract Items

The North Carolina Division of Purchase and Contract has established term contracts for many supply and equipment items used by agencies within the state of North Carolina. Items listed on term contracts **must** be purchased from the vendors listed on the contract at the negotiated term contract price. Prices and terms of the contract are binding for the term of the contract. Term contract information is available at the following website through the North Carolina

Division of Purchase and Contract: <http://www.doa.state.nc.us/PandC/>

Training programs for employees in using the Division of Purchase and Contract web page are available through the Purchasing/Equipment Department.

B. Purchase of Non-Term Contract Items (Open Market Purchases)

Supply or equipment items with a **total order cost** of less than \$1,000 may be purchased without obtaining competitive quotations. Comparative shopping to obtain lower pricing is strongly encouraged.

Supply or equipment items with a **total order cost** of \$1,000 to \$2,500 can be obtained by email, telephone, or facsimile (FAX) quotations from a minimum of three (3) vendors. One or more of the quotes must be from a Historically Underutilized Business (HUB). Contact the Purchasing Department for assistance in identifying HUB vendors. Email quotations should be attached to the requisition. Telephone quotations should be recorded on a Forsyth Tech telephone quotation sheet (available in the GroupWise Library) and attached to the requisition. Facsimile (FAX) quotations should be sent to prospective vendors on a Request for Quote form available from the Purchasing/Equipment Department. All facsimile (FAX) quotations must be attached to the requisition.

Supply or equipment items with a **total order cost** expected to exceed \$2,500 should be submitted on a requisition to the Purchasing/Equipment Department. Complete specifications for the requested items should be attached. The Purchasing/Equipment Department will obtain quotations in accordance with the regulations of the North Carolina Department of Administration and the Division of Purchase and Contract. Requisitions requiring written quotations or bids will require additional time for preparation of specifications and solicitation of quotations or bids.

C. Repairs

Where materials are being purchased for a repair that Forsyth Tech employees will perform the needed repair, the purchase of materials must be handled in accordance with normal purchasing procedures. In the event an emergency repair is necessary, contact the Purchasing/Equipment Department for instructions.

D. Requisition for Supplies/Equipment/Equipment Repair

Any full-time faculty or staff member may originate requests for supplies, equipment, services, or equipment repair. **Requisitions for items or services requiring prepayment are strongly discouraged and will generally not be approved.** It is highly recommended to locate a vendor that will accept Forsyth Tech's purchase orders. The **Requisition Form** can be found in the GroupWise default library.

All requisitions require the signature of the originator and the approving signature of a dean, director, or vice president. Equipment requisitions also require the signature of the appropriate vice president. In addition, equipment requisitions with a total order cost of \$10,000 or greater require the signature of the President.

Requisitions pertaining to airfare for travel may be submitted to the Purchasing/Equipment Department, however before a purchase order is processed a travel authorization must be received in the Accounts Payable Department for review. Requisitions for registration may be submitted to the Accounts Payable Department.

The majority of requisitions processed are to vendors registered in the NC E-Procurement System in which purchase orders are electronically submitted. In the case of purchasing items or services from a new vendor, the Purchasing/Equipment Department will need a W-9 tax identification form submitted from the vendor before a purchase order can be placed. Contact the Purchasing/Equipment Department for questions regarding this form.

E. Unauthorized Purchasing

All purchases for Forsyth Tech are the responsibility of the Vice President of Business Services or persons designated by the Vice President of Business Services. **No employee of the College, other than the President or Vice President of Business Services, is authorized to sign contracts, agreements, or make purchases which would obligate the College for payment.** College employees may be held personally responsible for unauthorized purchases.

F. Historically Underutilized Business Participation

The College has a Board adopted policy to encourage and promote equal opportunities for Historically Underutilized Business (HUB Vendors). This policy **is**

in support of a more diverse participation in all aspects of procurement and contracting opportunities at Forsyth Tech. Our goal is to utilize Forsyth Tech's expenditures for the procurement of goods and services from HUB Vendors with a minimum of at least 10 percent but encourage more procurement from HUB Vendors.

G. Utilities

Routine, recurring expenses such as electricity, water and garbage may be processed through Accounts Payable without a Purchase Order. Such payments must be approved in advance by the Vice-President of Business Services.

Other recurring annual expenses for instructional and operational purposes such as classroom supplies, security services, and telecommunications may require a blanket purchase order. These type expenses should be reviewed by the respective departments at the end of each fiscal year and submitted to the Purchasing Department for processing. The Accounts Payable Department will then make payments based on the blanket purchase orders.

3. Requisition Cut Off Dates

During the fiscal year, the last day to order equipment will be during **the first week of April**. Any anticipated equipment purchases requiring written requests for quotations (anything over \$2,500) should be sent to the Purchasing Department before **the last week of March**. The last date for all other requisitions will be **the first week of May**. These deadlines will allow us to receive and pay for items in this fiscal year. Only requisitions of an emergency nature will be considered after these dates. Thank you for your cooperation. Reminders will be sent out each year with the exact dates.

4. Receiving Supplies and Equipment

All shipments received must be examined upon receipt for correctness of quantity and item ordered. Any damage to external cartons must be noted on the delivery document in order to justify claims against the carrier. A full-time employee of the College must sign all packing slips or invoices received with a shipment. The packing slip and the invoice should be attached to the receiving copy of the purchase order and returned to the Purchasing/Equipment Department within three days so payment can be made. Partial shipments may be received, and the **Receiving Copy** of the purchase order should be sent to the Purchasing/Equipment Department indicating

the items received.

Equipment Procedures

1. Responsibilities for Equipment

All employees are expected to exercise reasonable care in maintaining property and equipment owned or assigned to Forsyth Tech. The furniture and equipment at Forsyth Tech are property of the North Carolina Community College System. Major equipment and furniture items are assigned an inventory number to identify the item. Inventoried items are assigned to various programs and designated individuals are responsible for proper utilization, security, and identification of the items. An annual internal audit of major equipment must be conducted during each fiscal year and the results submitted to the North Carolina Community College System. The custodian of the equipment assigned to each program is expected to be present for the internal equipment audit. An internal audit of major equipment may be conducted at any time during the fiscal year as the Purchasing/Equipment Technician and Director deems necessary.

2. New Equipment Requiring Asset Tags

All new equipment that requires asset tags which include equipment such as laptops or projectors must have an asset tag placed on it prior to leaving the Forsyth Tech campus for off campus use.

3. Transfer of Equipment

Before any equipment is moved, the Equipment Transfer Form must first be filled out and sent to the Purchasing/Equipment Department. The Purchasing/Equipment Department will approve or disapprove the move and notify the department involved with the transfer and the maintenance department. This form can be found in the GroupWise default library.

Office moves will be handled at the discretion of the Purchasing/Equipment Department. Transfer forms, Maintenance Services Forms, Help Desk Requests, Disposal Forms, and Requisitions should all be filled out no less than two weeks prior to the requested move date. The Move Procedures Document can be found in the GroupWise default library under the Purchasing/Equipment Department.

4. Lost or Stolen Equipment

Loss or theft of items should be reported to the Campus Police Office and the Purchasing/Equipment Technician and Purchasing/Equipment Director **as soon as**

the loss is discovered. Employees may be held responsible for loss of property from an area left unsecured by the employee. You may ask other employees and inquire of the whereabouts of the equipment, but you **must report it immediately**. It does not matter if you think it will turn up later. You must take action immediately.

5. Assignment of Equipment for Use Off Campus

Forsyth Tech equipment shall not be used off campus by any college employee unless the equipment is used for the purpose of preparation of teaching duties or record keeping in connection with classes or duties for the College. Permission to use equipment off campus must be granted by the responsible dean or director and approved by the appropriate vice president. A completed **Assignment of Equipment for Use Off-Campus Form** with all necessary signatures is to be filled out and sent to the Purchasing/Equipment Department and kept on file for each fiscal year. All assigned equipment shall be returned to the College prior to the expiration date as shown on the employee's contract for employment. **New Off-Campus Equipment forms are required to be filled out each year.** Employees are responsible for the loss or damage to equipment while the equipment is off the campus. This form can be found in the GroupWise default library.

6. Disposal of Equipment

State law does not allow us to sell items to individuals, nor give nor donate them to groups or non-profits. Any proceeds generated from the sale of such items go into the general equipment fund rather than to the department which bought or used the equipment. Legal and proper disposal of college equipment must be handled through the Purchasing/Equipment Department; individuals or departments should never sell, give away, or discard college equipment items. **This includes anything that is being thrown away other than regular trash items such as pens and paper whether or not it belongs to Forsyth Tech or not. If it is on Forsyth Tech property, and it is to be thrown out, an Equipment Disposal Form must be filled out.** This form can be found in the GroupWise default library.

Equipment or property that is surplus to the needs of a program is to be listed on an Equipment Disposal Form and submitted to the Purchasing/Equipment Department. The form requires the signature of the originator, supervising Dean or Director, and Vice-President. Surplus property is transferred to a surplus location on a space available basis. Please allow two weeks from the time the Purchasing/Equipment

Department receives the paperwork for the request to be completed. This does not include the time it takes to get all signatures.

Final disposal of property by the college in which it leaves the campus may be accomplished by listing for bid through the State Surplus Property Agency or the disposal methods permitted in General Statutes 160A-265 - 160A-271 (North Carolina General Statutes, 2007). At this time it is open for bidding to the public. The public website for viewing bids is:

<http://www.ncstatesurplus.com/ssp/public/ssphomepage/ssp.htm>

7. Termination of Programs

All program terminations must go through the Program Development and Audit Office. At any time a program is terminated, a copy of the **Curriculum Program Termination Form** should be filled out and a copy sent to the Purchasing/Equipment Technician. No programs should be terminated without this form. All equipment associated with this program will need to be transferred to another program or another college. The Transfer Form should be filled out and turned into the Purchasing/Equipment Department.

8. Reassignment of Equipment Custodians

At any time that an equipment custodian is no longer responsible for the equipment that was assigned to him or her, the Director or Dean of that person needs to immediately notify the Purchasing/Equipment Technician and either assign a temporary custodian or a replacement custodian over the equipment. If he or she would like to have another inventory conducted at that time in order to understand what equipment is his or her responsibility, an appointment will be set up and an inventory will be conducted.

9. Exit Inventory and Procedures

When a Forsyth Tech employee leaves the college and is a custodian of equipment, an Exit Inventory must be conducted prior to the employee leaving. All equipment must be accounted for during the exit inventory and a copy kept on file for that employee. DO NOT WAIT until this time to report lost or stolen equipment.

10. Laptops and Exiting Employees

Employees who have possession of a laptop must fill out a transfer form and bring the laptop and all accessories to the Purchasing/Equipment Department prior to

leaving. The laptop will remain on the same department's inventory, only the room location will change. The employee's checkout form will not be signed until the laptop and all accessories have been turned into the Purchasing/Equipment Department. The laptop will be backed up (CDs or discs must be supplied by the employee's department) and prepared for the next employee and will remain in the Purchasing/Equipment Department in a secure location until a transfer form is completed for the new employee to pick it up.

11. Donations to Forsyth Tech

Donations to Forsyth Tech are handled by the Forsyth Tech Foundation. A form is being devised and will be available soon in the GroupWise default library for receiving donated equipment. This form must be filled out by the receiver and turned into the Foundation/Grants Accounting Department.

12. Donations from Forsyth Tech

State law statute 160A-274 allows any governmental agency to transfer or donate equipment to another state funded organization. This statute includes other community colleges, state agencies, and our local school system (Equipment Procedures Manual Third Edition, 2001, p. 36).



13. Transfers from Other Colleges or State Agencies

Any equipment can be transferred between other colleges and state agencies.

Please use the proper form and follow the guide lines listed.

A. *Item Availability*

Contact the transferring institution to find out if the item(s) are still available and the deadline for picking up said item(s).

B. *Equipment Transfer Form*

The form should include the name, address, and contact person of the transferring college or state agency and the appropriate Inventory Custodian of Forsyth Tech.

If the item(s) require electrical or other installation work contact Scot Quesenberry in the Physical Plant Department and note his approval on the form. Obtain a Fair Market Value from an external source and include this information on the form. Obtain approval from the appropriate Vice President.

C. *Obtain Approval*

Submit the completed Equipment Transfer form to the Purchasing/Equipment Department for Business Services Division approval.

D. *Item(s) Pick Up*

Upon approval arrangements will have to be made to pick up the transferred item(s). Neither the Purchasing/Equipment Department nor the Maintenance Department will be responsible for picking up equipment from other colleges or state agencies.

E. *Submit Paperwork*

All paperwork obtained from the transferring college or state agency should be submitted to the Purchasing/Equipment Department. This should include a signature from the Forsyth Tech employee picking up item(s) from another state agency.

F. *Email Notification*

Notify the Purchasing/Equipment Department when the equipment has been received by email.



PIEDMONT BUILDING

BUSINESS SERVICES DIVISION

SURPLUS STORAGE AND DIESEL MECHANICS PROGRAM

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