# Marlboro College
# Purchasing Policies & Procedures

## POLICY

All purchasing for Marlboro College is done through the Purchasing Office located in the Plant and Operations building.

## Purchasing Department's Objectives

- Serve in an ethical, friendly and professional manner, as an effective liaison between user departments and vendors.
- Act as a responsible buyer in support of Marlboro College's cost containment efforts.
- Maintain a current knowledge of new technologies, vendor competence and competitive market conditions, as they relate to the material, equipment, supply and service requirements of Marlboro College and to act as an information center on sources of supply.
- Cooperate with departments on standardization objectives.
- Have contractual obligations fulfilled to the meaning and intent of the contract.
- Develop and help implement material management and purchasing programs, in coordination with user departments, to ensure timely and effective support at the lowest reasonable cost.
- Handle the mechanical operations of purchasing: obtaining competitive bids, ordering. Expediting, resolving discrepancies and making adjustment.
- Review programs and institute changes where necessary

## Authority to Requisition

Department Director's are responsible for adherence to their budgets. Approving Requisitions is one method for monitoring the expenditures. While it may be delegated, the authority to approve requisitions still resides with the Department Director.

## How to Obtain an Approved Purchase Order Number

- *A requester sends a completed requisition to Purchasing*.
  Purchasing enters the requisition information into the system and a purchase order is created. After the purchase order is approved, Purchasing will place the order and send a hard copy of the PO to the requestor. In some cases the requestor may want to place the order themselves and can do so after receiving the PO copy.

- Please note information regarding potential hazardous material designation, and need for a Material Safety Data Sheet (MSDS) is required for all orders.

- The order will be placed with the vendor indicated on the requisition, if any. The Purchasing Office reserves the right to utilize alternate suppliers for the same item where financial or other factors dictate.

- In the rare instance when someone, with prior approval from manager, has used his or her own funds to make a purchase, the employee will be reimbursed for the item(s) but not the sales tax, if any. In each case, receipts supporting all expenses must be turned in to the Accounting Office, which will be attached to a voucher for reimbursement.

- **NOTE: PROPER USE OF PURCHASING WILL HELP THE COLLEGE NOT TO PAY SALES TAX.**

## Requisitioner's Responsibilities

Effective purchasing requires a joint effort by staff members and Purchasing. Cost reductions result in increased purchasing power for departments and savings for Marlboro College. In order to achieve Purchasing's goal of providing a high level of service to all departments the following basic procedures should be followed:

- Anticipate requirements sufficiently in advance to allow time for quotes and to effect timely delivery.
- Be specific when preparing requisitions and requests. Include all details on the form.
- Routinely direct vendor representatives to Purchasing. Staff members have other important matters to attend to and Purchasing can initiate vendor contact, obtain information about an item and, if necessary, arrange for vendors to visit departments.
- Keep price quotations confidential.
- Inspect all deliveries immediately and carefully for any damage, then promptly sign and forward the packing list to Accounting.
- Approve and forward invoices promptly when sent to you. Late payments create a bad payment history for Marlboro College in addition to incurring interest charges.

**NOTE: THE COLLEGE WILL NOT ACCEPT FOR PAYMENT BILLS FOR ANY ITEM FOR WHICH THERE IS NO COPY OF A SALES SLIP OR INVOICE; UNDER THESE CIRCUMSTANCES THE CHARGES WILL BECOME THE RESPONSIBILITY OF THE INDIVIDUAL MAKING THE PURCHASE.**

GENERAL NOTES

1. Additional information on the mechanics of purchasing may be found in the document "Purchasing Procedures" (see attached).
2. As noted above, all purchasing for the College is done through the Purchasing Office. Individuals should not expect or attempt to place orders or charge items to the College without prior approval from the department manager.
3. You may access Purchase Requisition and Voucher forms by visiting the Marlboro College home page web site and adding "forms" to the address (http://www.marlboro.edu/forms). Hard copies may be printed for submission to the Purchasing Office.

**PURCHASING PROCEDURES**

## 1. Purchasing Goods and Services

1.1. A properly completed and approved requisition should be sent to Purchasing. The request should be complete and specific to avoid delays and possible return for clarification. Please note on Purchase order who is placing the order, Purchasing or Requestor.

1.2. Purchasing reviews requisition, prepares PO (or makes alternate arrangements to acquire item), and goods/service is ordered.

1.3. Purchase Order/Req Copies sent out:
- 1.3.1. Original PO & Req – kept on file in Purchasing Office
- 1.3.2. Copy of PO & Req – Sent to Accounting
- 1.3.3. Copy of PO – Sent to requestor
- 1.3.4. Copy of PO – Sent to mail service

## 2. Emergency Orders

2.1. An emergency shall be defined as an occurrence or need that presents a physical hazard to students, faculty, staff or the general public, a physical plant problem that would impede or shut down operation of a facility, or a systems failure that would seriously impair any critical function of the college and which could not reasonably be delayed 24 hours.

2.2. In this case, *you may place the order, t*hen, within 24 to 48 hours, depending on when the emergency happens, secure an approved purchase order number. You are then responsible for calling the supplier back and giving them the approved purchase order number.

## 3. Blanket Purchase Orders

3.1. When you need to use a particular vendor on a regular basis for small dollar items, Purchasing can create a blanket purchase order for the estimated dollar volume you will spend during a one-year period (this can be a shorter time period, i.e. month, semester, etc).
- 3.1.1. After the blanket purchase order has been approved you can call the supplier and order the items as needed. You must give the supplier the purchase order number to reference on all packing lists and invoices.
- 3.1.2. You are responsible for keeping track of how much you have ordered against the blanket purchase order.
- 3.1.3. You MUST turn in all invoices to Accounting by the end of the next business day.

If you have a question as to whether blanket purchase orders will work for your department contact purchasing to discuss.

## 4. Voucher Requests

4.1. The Voucher request is used to generate payments to vendors, individuals and other institutions for goods or services.

4.1.1. Voucher request form & all supporting documents ***must*** be submitted to Accounting.

4.1.2. Online memberships, subscriptions & conference fees should not be charged to the college credit card. These should go through accounting with a voucher request.

4.2. Voucher requests may be submitted to the accounts payable office anytime during the week.

4.2.1. Voucher requests needed for the current week must be submitted by Tuesday at noon to allow for sufficient processing.

4.2.2. Requests received after that time will be processed for the following week.

4.3. Checks are available on Friday.

## 5. Unauthorized Purchases

5.1. Purchasing any goods or services prior to obtaining proper authorization through the requisition/purchase order process is considered to be an *"unauthorized purchase"*. This type of transaction directly violates Purchasing policies.

5.2. It is the responsibility of the employee's immediate manager as to what disciplinary actions are taken, if any. Continued non-compliance to purchasing practices needs to be addressed.

## 6. Receiving Items

6.1. Materials are received into the college mailroom and the person is notified that he or she has a package.

6.2. The package is open and inspected by the person who requested the goods. The person checks the quantities received against the Purchase order and initial the packing list/invoice that the review is complete.

6.3. The packing list/invoice is then sent to Accounts Payable indicating it may be paid.

6.4. If there are errors with the order, then the person who is inspecting the package should make the notation on the packing slip/invoice, send to Purchasing, and the vendor will be called immediately to correct errors. Then Purchasing will send the packing slip/invoice to Accounts Payable with notes on actions that are being taken to correct errors and whether or not payment can be made or held until fully rectified.

6.5. Accounts Payable will review all purchase orders, packing slips and invoices for proper initials indicating clean receipt of goods has happened as indicated above. If there are any discrepancies, Accounts Payable will return documents to the requestor for clarification.