



# PROCEDURES FOR ACQUIRING GOODS & SERVICES

**INDEX CODE: 619**  
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### **I. POLICY**

The policy of this department is to establish purchasing procedures which will facilitate the procurement of goods and services in compliance with County Administrative Procedures and procurement regulations. Coordination of grants to pay for goods or professional services will be referred to the Grants Coordinator, Management & Planning Section.

### **II. DEFINITIONS**

#### **A. Capital Outlay**

Fixed assets which have a useful economic life of more than one year.

#### **B. Supplies**

Consumables that are used in the everyday operation of a unit (i.e., paper, pens, forms, first aid supplies, etc.)

#### **C. Purchase Request**

The instrument used to request that the Purchasing Office order or contract for specific goods, capital outlay, supplies, and/or services.

#### **D. Direct Purchase**

Direct purchases are used to secure goods, professional, or non-professional services when the value of the purchase is not greater than \$1,000. Direct purchase procedures may not be used when the goods or services to be obtained are covered by any existing contract with the County. Purchases which in the aggregate would exceed the \$1,000 limit may not be subdivided or "split" to procure with the direct purchase limitations.

#### **E. Petty Cash**

Used to expedite emergency minor purchases of small, expendable items. This fund or the Expense Reimbursement Statement will reimburse employees for local travel expenses (i.e., tolls, mileage, etc.), when deemed appropriate, for the purpose of conducting official County business. Specific petty cash procedures are explained in Index Code 619.1.

### **III. PROCUREMENT OF GOODS OR SERVICES**

Before any action is taken regarding the procurement of goods and/or services, the Budget Unit or the Grants Unit in the Management & Planning Section must be contacted to determine if funds are budgeted. Once it is determined that funds are available, employees and/or units shall work with the Management & Planning Section in the event research and/or testing of goods or services is necessary to determine their potential for acquisition.

The Management & Planning Section working with the requesting unit can contact vendors regarding the potential, ongoing and completed procurement of goods and services.

If any employee does not follow this directive and/or the County Administrative Procedures, the County will not reimburse the employee for the purchase.

#### **IV. PURCHASE REQUEST PROCEDURES**

A. No member will enter into an agreement with any vendor for goods and/or services unless they have consent from the Budget Unit or Grants Unit within the Management & Planning Section. A member may be held personally liable for payment of goods and/or services should the purchase not have received prior approval.

B. Before contacting the Management & Planning Section, information such as brand name, model number, color, size, approximate cost, possible recommended vendor, vendor's Federal I.D. number, phone number, and address is required. (If computer related equipment, see Index Code 505 for instructions) Providing this information to the Management & Planning Section does not mean you can order this item. Also be sure when contacting various vendors for information, that they do not mistake your inquiry as an order. Do not request a sole source vendor unless that vendor is the only one who makes the item or is unique in some form. Sole source vendors have to be justified. Just because you prefer the item over another is not a valid reason for a sole source vendor.

C. At the time the Management & Planning Section receives your request, the method of procurement will be determined. The methods may be procurement card, direct payment, blanket order or purchase order.

D. Once the goods or service are received, the requestor will:

1. Be notified by the Property Management Unit that the requested items are ready for pickup, or
2. If to be shipped direct, confirm the items received, sign and date the packing slip, bill of lading, or copy of the purchase order and submit all documents (packing slip, bill of lading, invoice, etc.) to the Management & Planning Section within two days of the receipt of goods. The Management & Planning Section will then process the payment.

#### **V. EMERGENCY ACQUISITION OF EQUIPMENT**

Commanders who need to acquire equipment on an emergency basis may do so if:

- A. The total cost of the equipment is less than \$500; and
- B. The equipment is available from a vendor approved by the County or the Management & Planning *manager*.

In such cases, the commander will submit written justification for the purchase to the Management & Planning Section, via the chain of command, within 24 hours after the purchase. In all other cases, the purchase must be coordinated through the *manager* of the Management & Planning Section regardless of the time of day.

#### **VI. PROPONENT UNIT: Management & Planning Section**

#### **VII. CANCELLATION: This directive cancels Index Code 619, dated 07-01-04.**