



Purchasing Handbook

Purchasing Services,
Business Services Department

January 21, 2026

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SECTION I: Purchasing Authority

The purpose of this Handbook is to explain how to purchase the goods and services needed to support the District's goals to promote student success.

The Business Services staff are committed to providing the highest level of customer service, efficiency and integrity in their duty to procure the goods and services necessary for the college to fulfill its educational mission. This Purchasing Handbook is designed to provide detailed information that will assist departments with their purchases of needed goods and services. It explains standard operating procedures and provides examples of a variety of common tasks. The guide is intended to be used as a learning tool and reference for all employees.

The Purchasing Department strives to maintain excellent working relationships with its vendors and suppliers, as well as the community at large by conducting business in a fair, equitable, and ethical manner.

The following are some of the core principles and standards followed for District procurement:

1. **Impropriety.** Prevent the intent and appearance of unethical or compromising conduct in relationships, actions and communications.
2. **Conflict of Interest.** Ensure that any personal, business and other activities do not conflict with the lawful interests of the District.
3. **Influence.** Avoid behaviors or actions that may negatively influence, or appear to influence, supply management decisions.
4. **Supplier and Customer Relationships.** Promote positive supplier and customer relationships.
5. **Sustainability and Social Responsibility.** Champion social responsibility and sustainability practices in supply management.
6. **Applicable Laws, Regulations and Agreements.** Know and obey applicable laws, regulations, and trade agreements applicable to supply management.
7. **Professional Competence.** Develop skills, expand knowledge, and conduct business that demonstrates competence and promotes the procurement profession.

A. Authority for Procurement: Goods and Contracts/Services

Pursuant to Education Codes 81656, 70902(d), 81655, 81656, and Public Contract Codes 20650, 2065, as well as Board Policy 6330, the Palomar Community College District Board of Trustees has the sole responsibility and authority to enter into purchase contracts (Purchase Orders) on behalf of the District. The Board has adopted policies and procedures governing the purchase of supplies, equipment, and services. The Board also has the authority to delegate this responsibility as they deem necessary. **This responsibility has been delegated to the Business Services/Purchasing Department.** Only Business Services/Purchasing designees are authorized to commit funds in the name of the District.

All approved purchases shall comply with District, state and federal policies and regulations including public bidding requirements and conflict of interest laws. No purchase shall exceed the amounts specified by Section 20651 of the California Public Contract Code as amended from time to time. Per Ed Code, all transactions shall be reviewed by the Governing Board *at least* every 60 days.

Applicable state laws are found in the Education Code, Public Contract Code and Government Code. More information can be obtained at <http://leginfo.legislature.ca.gov/faces/codes.xhtml>

B. Unauthorized Purchases

Per Board Policy 6330, only individuals who are authorized Purchasing designees may enter into contracts or purchasing/procurement indebtedness on behalf of the District. Additionally, the signing of contracts must only be undertaken only by the specific individuals who have been approved by the Board of Trustees to enter into (sign) agreements on behalf of the District. Authorized signers are:

- The Director of Business Services
- The Vice President of Finance and Administrative Services
- The Superintendent/President

Employees outside of the Purchasing Department are NOT authorized to contact a vendor directly to place orders (make a purchase) or sign agreements on behalf of the District. The only exception to this would be an Open/Blanket Purchase Order (PO). Open/Blanket POs name specific individuals who are authorized to place orders against that PO, up to the specified dollar amount on the Purchase Order. Departments with Open POs must track their spending to assure they do not exceed the total amount of the PO.

Vendors regularly doing business with the District are aware of this policy and are advised that all purchases chargeable to the District must be authorized by an official District Purchase Order (PO) and/or an officially signed Agreement/Contract. ***The District is not obliged to reimburse employees or vendors for the cost of unauthorized purchases.***

C. Conflict of Interest

Government Code section 1090 states:

(a) Members of the Legislature, state, county, district, judicial district, and city officers or employees shall not be financially interested in any contract made by them in their official capacity, or by anybody or board of which they are members. Nor shall state, county, district, judicial district, and city officers or employees be purchasers at any sale or vendors at any purchase made by them in their official capacity.

(b) An individual shall not aid or abet a Member of the Legislature or a state, county, district, judicial district, or city officer or employee in violating subdivision (a).

(c) As used in this article, “district” means any agency of the state formed pursuant to general law or special act, for the local performance of governmental or proprietary functions within limited boundaries.

(d) Employees of the District are not authorized to be vendors. It is a conflict of interest to contract with employees of the District and is not permitted, per Government Code.

SECTION 2: Purchasing Responsibilities

The responsibility for purchasing supplies, equipment and services for the district is centralized in the Purchasing Department. The Director of Business Services and Purchasing Supervisor shall ensure that appropriate purchasing regulations and procedures are established and published. All District procurement transactions shall be conducted in an efficient and businesslike manner and shall be based upon the highest standards of fairness, honesty and integrity.

A. Purchasing Activities – Purchasing Services

Purchasing staff are tasked with the following activities:

1. Carry out the purchasing function in accordance with all provisions of the California Education Code, Government Code, Public Contract Code, and District Board Policies and Administrative Procedures.
2. Assist departments with Purchasing questions, identify potential vendor sources, and obtain quotes as necessary.

3. Maintain vendor database.
4. Assure purchase requisitions are properly authorized.
5. Source requisitions into Purchase Orders (POs) and processing for fulfillment.
6. Increase or decrease Purchase Orders, as necessary.
7. Expedite emergency orders as authorized by the VP of Finance and Administrative Services or the Director of Business Services.
8. Assuring all purchases are reasonable and customary.
9. Advise departments and vendors on District requirements.
10. Prepare bids and ensure the legal requirements of the process are met.
11. Review contract language for requirements including hold harmless, indemnification, proper insurance levels, terms/termination, and process orders that relate to these documents.

B. Purchasing Activities – District Employees

District employees are tasked with the following activities:

1. Assure that all purchases made are reasonable and customary. Since public taxpayer funds are being used, all employees must be good stewards of these funds by purchasing essential items at the best price possible. The department is responsible for shopping for the best price and value for all items purchased.
2. Read and follow all District Purchasing processes and policies and ask for clarification when needed.
3. Read and follow all District Contract processes and policies and ask for clarification when needed.

SECTION 3: Purchasing Staff Directory

Director of Business Services: Ann Jensen (AJensen@Palomar.edu), x 2139

Name	Title	E-Mail	Extension
Amber Cross	Purchasing Supervisor	ACross@palomar.edu	X 2127
Todd Wilcox	Buyer	TWilcox1@palomar.edu	X 2192
Claudia Barranon	Buyer	CBarranon@palomar.edu	X 2125
Vacant	Buyer	Vacant	

SECTION 4: Purchasing Process

A. Requisitions

A requisition is not a Purchase Order and, thus, cannot be sent to the vendor to procure products and/or services. Requisitions are internal forms within PeopleSoft that are used to establish purchases and pre-encumber budget funds. Requisitions must include descriptions, price, method of funding, etc. A Purchase Order (PO) is a legally binding contract between a vendor and the District to procure the necessary product/service.

District employees outside of the Purchasing Department are not authorized to place an order, promise an order, or otherwise authorize the purchase of any goods or services.

Unauthorized purchases may result in the individual incurring a personal financial and/or legal obligation to the vendor.

B. Requisition Entry

Detailed, online requisitions are submitted by the requesting department and go through an approval process, based on the budget string being used. Each requisition must be entered with sufficient detail that reflects the information on the quote/invoice, including all line items. Entering detailed requisitions is the responsibility of the requesting department. **Requisitions must not be entered as one lump sum without line-item detail.** Any supporting documentation, such as quotes, proposals, order forms, etc., must be attached to the requisition within PeopleSoft. **All purchases must be made via the requisition process.**

The purchase of a product or service is not allowed prior to issuance of a PO unless there is an emergency. Emergencies must be to support life/safety, not a failure to order the item in a timely manner. *In the event of an emergency, the purchase must be **preapproved** by the Director of Business Services, Purchasing Supervisor, or Vice President of Finance and Administrative Services in advance.*

C. Requisition Process

1. Data Entry

Requesting department will prepare and enter a requisition (req). The req must include the proposed vendor (supplier), full description of item or service, unit of measure, quantity, price, model number, brand, size, color, delivery location, and include the appropriate accounting string. When the requestor has completed entering the requisition detail, the requisition must be budget checked, then submitted for approval. This will ensure that there is enough funding in the account string being used to cover the purchase total and “pre-encumber” (hold) those funds so they cannot be expended for another purchase. A quote, invoice, or other backup detail must be attached to the requisition when it is entered to support the costs in the requisition.

DO NOT ATTACH EXPIRED QUOTES. If the quote is expired, contact the vendor for an updated quote before proceeding or the purchase will be delayed so that a new quote may be obtained.

2. Approval Process

Once the requestor saves/submits the requisition, it will move forward through an authorized approval route based on the account/budget string used. Note that audio/visual and information technology-related requisitions will also be routed to Information Services for approval *prior to routing through the departmental workflow*. **If you are purchasing software or renewing a purchase of software, please see section 7, B. for steps that need to be done BEFORE you submit your requisition.**

3. Requisition Processing Time

The length of time that it takes to process a requisition (req) into a Purchase Order depends upon many factors, such as how long the req takes to route through the approval chain within the requesting department, how accurate the data entry from the requester is, and the complexity of the order. Once the requisition has been approved by the final approving official in the approval chain, the requisition will appear in an “Approved” status in PeopleSoft and will go into the queue for processing. *Approved requisitions are processed in the order they are received.*

That there are certain times during the year, such as prior to a semester start, where it will likely take additional processing time to receive a PO. *Please plan well in advance during these especially busy times.*

The req must show a status of “Approved” in order for Purchasing to create the PO and place the order. Purchasing must also have all required documents (e.g., unexpired quote, invoice, backup documentation, terms and conditions, etc.) before proceeding.

NOTE: For Contract Purchase Orders, the contract/agreement must be fully executed (signed by both parties), all required documentation received (e.g., bonds, insurance information, etc.), and the req must be fully approved in PeopleSoft before a PO can be processed. **All** items must be in place (fully executed contract and PO) for a contractor to begin work. There are no exceptions!

4. PO Processing

Once the requisition has been approved by all parties in the funding-driven approval chain, it will be available to assign to a Buyer who sources the requisition into a PO and completes the order. Once a PO is processed the status changes in PeopleSoft to “dispatched.”

Before requesters reach out to Purchasing for the status of a PO, be sure that it is in the “approved” status in PeopleSoft first. If the req is still showing a status of “pending” then this means it has not been approved by all individuals on the approval chain. If this is the case, please follow up with those in the approval chain to review and approve the req as soon as possible.

5. Delivery

Under no circumstance are products to be delivered to, nor service be performed at, a private residence. All orders must be shipped to Central Receiving at the main San Marcos campus without exception. If larger equipment must be delivered to a Center, please work with Purchasing in advance to make these arrangements.

NOTE: Step by step directions for how to create a requisition are found [here](#). For specific questions regarding requisitions, Purchase Orders, or any other questions related to Purchasing, please contact PurchasingDepartment@Palomar.edu.

D. Internal Controls

Purchasing goods and services through the District’s Purchasing Department ensures the following internal controls:

- Purchase requisitions receive prior approval through the electronic requisition approval process (based on funding used) within PeopleSoft
- Budget is encumbered ensuring the availability of funds
- Best pricing is obtained by utilizing volume pricing, District pricing contracts, or cooperative agreements
- Assets are assigned the correct account code in the requisitioning process, ensuring the availability of funds in the appropriate code prior to purchase
- Ensure compliance with District standards for specific items (technology, audio visual, furniture, contracts, etc.)
- Assures District compliance with all codes and laws as required by the California Education Code, Public Contract Code, and Government Code in regard to purchasing and contracting
- Ensure District is in compliance with Labor Codes 1720 and 1725.5 in regard to public works and prevailing wage laws

E. Open Purchase Orders/Blanket Purchase Orders

An **open purchase order** (open PO), also called a **blanket purchase order**, may be requested for small recurring supply purchases are to be expected from a single vendor on as-needed basis throughout the fiscal year. Limited by dollar amount, time, and type of goods, it is distinguished from other types of POs.

Equipment valued at \$200 or more, including tax and freight, cannot be purchased on open POs. Open POs are allowed to be used *only* for small frequent purchases of supplies.

F. Open PO Process

To request an open purchase order, the following information must be listed on the requisition:

1. Vendor name
2. Type of items to be purchased (i.e. food, office supplies, lumber, hardware, etc.)
3. Effective dates. Requested expiration date of the PO can be *no later than June 30th* of the current fiscal year. Purchases against the open PO must take place no later than June 15th to allow all products to be received and invoices to be received and paid prior to the end of the fiscal year. **PLEASE PLAN AHEAD!** The only exceptions are open PO's for Catering Services and perishable food items that must be completed by June 30th of the current fiscal year.
4. Not to exceed total (amount). Review the previous fiscal year and determine current year's need so that increases are not needed throughout the year, as practicable. **Note that continual increases to Open POs take time for Buyers to process, and slow down the purchasing process for all District stakeholders.**
5. Names and positions of authorized personnel who will make purchases with the open PO must be provided. These individual's names will be listed on the face of the PO.

G. Reminders regarding Open POs

- Open POs cannot be used for the purchase of goods exceeding \$10,000 using **Federal funds**.
- The open PO is limited by dollar amount, time-period, or type of goods ordered.
- Open POs are issued annually with the term beginning no earlier than July 1 and ending no later than June 30th of the current fiscal year. Open POs may have later starting and earlier ending dates when required by special circumstances.
- For accounting reasons, effective dates may not cross over fiscal years. Open POs expire no later than the end of each fiscal year. **All items purchased with an open PO must be physically received by the District by June 30th.**
- Items received after June 30th purchased using an open PO will be expensed in the fiscal year they were received.
- Only those parties designated on the face of the open PO are authorized to incur expense against the open purchase order.
- **No single item purchased on an open PO shall exceed \$400, including tax and delivery.**
- Open POs must comply with all limitations and restrictions as specified on the face of the open PO.
- Departments may not expend more funds than is indicated on the open PO. Limit the dollar value of the transactions to the dollar value of the open purchase order without going over the PO total; **the dollar value is a fixed maximum and may not be exceeded.**
- If departments find that the dollar value of the PO needs to be increased **ahead of time**, a new requisition must be entered, and the PO increased *prior to making any additional purchases*.
- The Department is responsible for tracking PO balances and what has been purchased against open POs so they do not exceed the POs dollar value.

H. Budget implications:

- Be aware that the full amount of the open PO will be encumbered immediately once created; thus, funds will not be available to spend for other purposes.
- Departments may increase the amount of an open PO by submittal of a requisition for the increased amount referencing the existing PO number to be increased.

- Departments may decrease or cancel the open PO by completing a [PO Change Request Form](#) and submitting it to Purchasing for processing.
- Increases will reduce the available balance for the expenditure accounts; decreases or cancelations will add to the available balance.
- Open POs may not be used for the purchase of furniture, computers and peripherals, software, printers, copiers, fax machines, gift cards, equipment service/maintenance contracts, or equipment valued over \$200 or more. End users must reference the open PO number on all related transactions with the vendor.
- If shopping in person, take a copy of the PO along for easy reference.
- Send written notification to PurchasingDepartment@palomar.edu to request the addition or deletion of authorized personnel allowed to purchase against the open PO.
- Submit all invoices to Accounts Payable for processing on a timely basis, referencing the PO number. Delays in processing payment can significantly impact the credit rating of the District and may negatively impact ongoing or future transactions with a particular vendor.
- **Chronic or recurrent problems submitting invoices and payment authorization to Accounts Payable may result in the loss of open PO privileges.**
- All open POs terminate at the end of the fiscal year. If there are unused funds on the open PO on the date that the PO expires, the encumbrance is released.
- Discontinue purchasing against the open PO at the **end of May** or date designated by Purchasing to allow time for the receipt of goods and for Accounts Payable to process the final payment by the end of the fiscal year.

I. Emergency POs

There may arise a situation where an Emergency PO for critical work (e.g., repairs) needs to be completed when there is risk to life, safety, or property. This situation is rare and can only be initiated by the Director of Business Services or the Vice President of Administrative Services (or designee). The Director of Business Services or VP of Fiscal and Administrative Services will work with the Purchasing Supervisor to obtain an emergency PO number that will be provided to the department.

Depending upon the extent of the emergency and the cost of the work, the Director of Business Services may need to coordinate with the Superintendent of the County Office of Education's office and Board to have the emergency work ratified or approved. Any emergencies that exceed the bid limit will require County Office of Education and Board of Trustees approval.

J. CalCard Purchasing Card Program

The California Department of General Services (DGS) has a Participation Addendum with US Bank National Association for purchase card services to support the State of California Purchase Card (CalCard) Program. The district makes use of this program for those purchases allowable via credit card. For more information about the CalCard Purchasing Card program itself, see the DGS [CalCard website](#).

For more information about CalCard at Palomar, in addition to the procedures for the approved use of CalCards, please see the [CalCard web page](#).

K. Prepayments

Every effort must be made to avoid prepayments and work only with vendors who will accept purchase orders and invoice the District after the receipt of goods or services.

If a vendor requires payment in advance of shipping an order or performing a service, or requires payment on the day of providing a product or service, this is considered a prepayment because the payment is processed *before the receipt of the goods or services*, rather than the vendor being paid "net 30 days" from the receipt of goods/services.

Follow the same procedure of entering a purchase requisition and attach all required documentation from the vendor stating that prepayment is required. An invoice must be attached for prepayment to occur. The invoice from the vendor must note the total cost of the order, including sales tax, shipping, and/or handling charges, if any. **Requisitions must clearly state “PREPAYMENT REQUIRED”.**

After the PO is processed, Purchasing will send the PO and the necessary back-up documents to the Accounting Department to issue a check and mail it with the vendor copy of the PO. If other arrangements need to be made (e.g., picking up a check), please indicate this information on the req.

L. Professional Services

Procurement of professional services **requires** a formal written contract, signed by the District and the vendor and a PO in place before services are performed. Depending upon the type of services required and the value (not to exceed cost) of the contract, a formal process to obtain proposals may be required.

This process must be completed with a PO and fully executed contract in place before the product can be ordered, or service may begin. All service providers are required to meet the insurance requirements on the contract and to submit a W-9. All contracts for services must be reviewed by Contracts staff before being executed. Work with Contracts@palomar.edu on these requests.

If necessary, the purchasing and/or contracts staff will assist departments through the Request for Proposals (RFP) or bidding process including issuing the RFP/bid, advertising (if necessary), evaluating, and the award of the contract. Staff will also coordinate the drafting and reviewing of the contract, obtaining necessary signatures, and the required Board of Trustees approval.

M. Payment Requests

A Payment Request is a method of authorizing disbursement of payment directly to vendors without processing a requisition through the Purchasing Department. Payment Requests are allowed in limited instances, and should not be used for the purchase of goods or to pay for services.

Payment Requests are made when a payable has been recognized, the payment is in compliance with all federal, State and District requirements, and a District Purchase Order has not been issued. Examples of allowed Payment Requests are indicated below.

Payment Requests are limited to the following types of transactions:

- Insurance and/or Benefits (e.g., HR or Risk Management)
- Utilities (Facilities Department only)
- Land acquisitions with Board approval
- Travel advances, travel reimbursements, certain conference registrations, mileage, airfare, car rental, or lodging.
 - Proper supporting documentation is required.
 - Please work with Fiscal Services on travel-related questions.

Requirements: Payment Requests are to be submitted via PeopleSoft once all authorizations have been obtained and all supporting documentation has been attached.

Payment requests must include:

- Vendor/Employee name and company's Federal Tax ID number
- Remittance address
- Amount to be paid
- All receipts and/or invoices
- Department and budget account number(s) to be charged

Incomplete payment requests will be returned to the department for correction. Attach all receipts/invoices to your payment request. Payments are generally processed and paid within 14 business days after they have been approved by the department and submitted to Accounts Payable. Directions for how to submit a payment request are found on the [Fiscal Services website](#). Direct questions about Payment Requests to Accounts Payable (AP@palomar.edu).

N. Prohibited Purchases

Certain purchases, categorized as illegal expenditures of District funds, will not be sanctioned or approved for payment by the District. These items include, but are not limited to, alcohol, tobacco, medicines (except for use by Health Services), donations, decorative pictures, gifts, personal memberships, individual subscriptions unless approved by the area Vice President, and other items for personal use or that would be considered a gift of public funds.

O. Sales Tax

Not all vendors located outside of California collect California sales tax. Even though the vendor may not collect the sales tax, the District is required to pay the tax to the State of California. The PO will include the applicable sales or use tax.

SECTION 5: Purchasing Thresholds and Requirements

Purchasing Thresholds Limits for Goods and Services* (Not public works/construction)	
\$119,100 (2026 Calendar year Bid Limit)	Purchases higher than the current bid limit must be formally bid and require Board of Trustees approval. <ul style="list-style-type: none"> ▪ PCC 20651(a) amount increases <u>annually</u> effective January 1st of <u>each year</u> ▪ Includes the purchase of equipment, materials, or supplies to be furnished, sold, or leased to the District. ▪ Includes services that are non-construction ▪ Includes repairs and maintenance as defined in PCC Section 20565, and that are not public projects as defined in PCC Section 22002(c) ▪ Exceptions are piggyback, cooperative bids, professional services, instructional materials, textbooks
\$50,001 – \$119,100	Requires a minimum of 3 written quotes or an RFP/Q* Quotes must be attached to the requisition when submitted**.
\$10,001 - \$50,000	Requires verbal or written quotes from 2 or more vendors*
\$10,000 and less	Additional quotes may be required as deemed necessary by the Purchasing Department, or if the quote provided is expired.

NOTE:

*Purchases that fall below the formal bid limit amount are subject to review and approval by the Purchasing Department and shall be made with as much competition as is practical and deemed necessary by the Buyers, Purchasing Supervisor, or Director of Business Services.

**If the lowest quote is not used, Department must provide a justification on the req as to why.

SECTION 6: Bidding Requirements and Purchase Limits

A. General

Competitive bidding requirements are founded on public policy declared by the Legislature of California to protect the taxpayers from fraud, corruption, favoritism, extravagance or carelessness of public officials, and the waste or misuse of public funds. In general, goods and services valued over the statutory bid limit must be procured through a formal competitive bidding process. The bid threshold changes each January per Public Contract Code 20651.

B. Bid Splitting

It is **unlawful** to separate into smaller work projects or purchases (split), any work, project, service, or purchase for the purpose of evading the competitive bidding process per Public Contract Code 20657. Bid splitting is not different scopes, timelines products/brands. Bid splitting is intentionally dividing up a scope of work or a purchase to fall under the bid limit.

C. Contract Lengths

Per Education Code 81644, contracts for goods may not exceed three (3) years. Contracts for services are not to exceed five (5) years. Under no circumstances should the District agree to auto-renewal terms on any contract as this is a violation of Ed Code.

D. Contract Award

Contracts that require bidding are awarded to the lowest responsive and responsible bidder. However, California Education Code allows for one other method of contract award. Section 81645 states “*The governing board of any community college district may contract with a party who has submitted one of the three lowest responsible competitive proposals or competitive bids, for the acquisition, procurement, or maintenance of electronic data-processing systems and equipment, electronic telecommunications equipment, supporting software, and related materials, goods, and services in accordance with procedures and criteria established by the governing board.*”

E. Annual Bid Limit

According to Public Contract Code section 20651, the District must competitively bid any purchase involving an expenditure that is higher than the current annual bid limit. The bid limit applies to the purchase of equipment, materials, supplies and services (except construction services/public works), and repairs (including maintenance) as defined in Public Contract Code section 20155 Public Works Projects.

A public works project is defined as construction, alteration, demolition, installation, or repair work done under contract and paid in whole or in part out of public funds, and painting or repainting any publicly owned, leased or operated facility. This means that anything installed in/on or affixed to a District facility is considered public works. Some examples of public work projects are:

- Repair/replacement of HVAC or similar systems
- Hanging of cabinets, whiteboards, or installation of furniture
- Signage installation
- Painting, flooring, roofing
- Installing equipment or items affixed to the wall/floor, whether indoors or outside, or the repairs of such equipment
- Repairs to elevators or other equipment that is affixed to a building, or to any part of District property (e.g., affixed to a walkway/parking lot, building, wall, floor/ceiling, etc.).

F. California Uniform Public Construction Cost Accounting Act (CUPCCAA)

Section 22030 of the Public Contract Code provides that a district may adopt CUPCCAA procedures allowing the District to increase the formal bid limits for its public works projects. The District has adopted CUPCCAA, and must follow the guidelines of this Act. CUPCCAA is a useful tool for the District as it raises

informal quote thresholds, simplifies the informal quote process for small projects, reduces advertising costs, expedites the bidding process, and increases the likelihood that the bids received will be from responsive, responsible contractors. The District's CUPCCAA procedures also includes activities considered maintenance.

Maintenance is described as:

- Routine, recurring, and usual work for the preservation or protection of any publicly owned or publicly operated facility for its intended purposes
- Minor repainting
- Resurface of streets and highways at less than one inch
- Landscaping: Including mowing, watering, trimming, pruning, planting, replacement of plants/trees, and servicing of irrigation and sprinkler systems

G. CUPCCAA Qualified Contractors

Under CUPCCAA, the District is obligated to create and maintain an annual approved list of qualified contractors, by the category of work they perform. Each November, the District is required to publicly invite licensed contractors to submit their name for inclusion on the list. Contractors may be added to the list at any point in the year. Once approved, contractors are included on the District's approved CUPCCAA list until the end of the current calendar year.

H. Public Works Thresholds

The thresholds for Public Works (construction) Projects are the following:

- a) **Under \$75,000:** These contracts for construction services would be exempt from bidding requirements; these projects would be performed by negotiated contract. The District may select a qualified contractor from the District's CUPCCAA list for a project without going through an informal or formal bid process. **NOTE:** Public Works Projects that exceed \$25,000 **require** payment and performance bonds per Civil Code section numbers 9550-9566. Bonds must be received *prior to work commencing*.
- b) **Projects from \$75,000 - \$220,000:** Contracts are awarded to the qualified contractor submitting the lowest **informal bid** through the informal bidding process.
- c) **Over \$220,000:** Contracts for Public Works Projects exceeding this amount are subject to the **formal bid** process.

NOTE: More information about Public Works, CUPCCAA, and bidding requirements for these projects may be found on the Contracts website [here](#).

I. Bidding

Either informal or formal bids may be required, based on the purchasing activity and the dollar amount of the anticipated purchase or contract/agreement.

- Purchases for **goods** (tangible products) that exceed the annual bid limit must follow the formal bid process.
- **Services** that exceed the annual bid limit may be required to follow the formal bid process, or the Request for Qualifications/Request for Proposal process, depending upon the service being provided. Work with the Contracts team to assure that the appropriate method is being used.
- Public works projects will fall under the categories indicated in the previous section, depending upon the cost or estimated cost of the project.
- For assistance with a **goods/product** bid, please reach out to Purchasing at PurchasingDepartment@Palomar.edu.

- For assistance with a bid for **services** or **public works/CUPCCAA** projects, please reach out to Contracts@Palomar.edu.
- The only exceptions to bidding is discussed in the following section (Cooperative Agreements).

J. Cooperative Agreements

In accordance with PCC 10298 the formal bidding process may be waived if the Board approves the District to utilize a cooperative agreement, also called a piggyback agreement/piggyback contract. These are contracts for items bid by another public agency for the benefit of other public entities that pool the purchasing power of the group for the most advantageous pricing. The bids follow the formal bidding process required of public entities in California.

Several entities within California, such as the Foundation for California Community Colleges (FCCC) College Buys program and the State's California Multiple Award Schedule (CMAS) program offer cooperative agreements that are written to allow the District to join to take advantage of preferred pricing for goods and/or services. Several other nationwide purchasing consortiums also have piggyback agreements that the District may potentially take advantage of. Cooperative purchasing entities such as Sourcewell, NASPO ValuePoint, and CalSAVE also have similar options. However, agreements other than FCCC and CMAS must be closely vetted by Purchasing to ensure they are allowable to use. If the cooperative agreement is allowable, it must be Board approved *prior to use*.

For additional information about cooperative (piggyback) agreements, including what agreements might be available, please contact PurchasingDepartment@palomar.edu.

SECTION 7: Approvals: Thresholds and Other Required Approvals

A. Approval Thresholds

- The Purchasing Supervisor will review all purchase requisitions before they are moved forward for approval. This will assist in identifying any parts of the requisition that may hold up the process and assist in decreasing delays in purchase order processing.
- Restricted funding: All requisitions for purchases involving restricted funding, such as State Lottery Funds or Federal Funds will be routed with additional approvers, depending upon the budget string used.

B. Other Approvals

Depending upon the purchase, other approvals might be required, as follows:

- **IS approval**: All requisitions for computer hardware, software, or multimedia equipment must be approved by the IS department. Requisitions are sent to IS in the PeopleSoft approval chain prior to the other approvers on the requisition.
 - Both new software purchases and renewals **must** meet District accessibility and cybersecurity guidelines.
 - The requesting Department must request a **VPAT** and a **HECVAT** from the vendor that addresses how their product meets these standards. These terms are defined below.
 - The **VPAT** and the **HECVAT** should be sent to IS for review and approval **prior to any new or renewal software purchased**.

Definitions:

VPAT: Voluntary Product Accessibility Template (VPAT) is a standardized form vendors use to document how their product meets accessibility standards. An Accessibility Conformance Report (ACR) is the completed version of that form, essentially the final report that shows the product's

actual level of accessibility. The ACR is reviewed by Palomar after it has been completed by the vendor.

HECVAT: Higher Education Community Vendor Assessment Toolkit is a security assessment questionnaire that measures the cybersecurity risk of third-party vendors for higher education institutions. Palomar will accept HECVAT, HECVAT Lite, SOC2 Type 2, or FedRAMP / StateRAMP authorization.

- **Facilities approval:** If a project involves installation of equipment or other affixed items (flooring, painting, equipment installation), departments must work with Facilities first to assure that Facilities has vetted the project and include it in their scheduling. Departments are not authorized to modify District property, install items, or update building systems (e.g., HVAC, air handling, furniture installations, etc.) without the close involvement and approval of the Facilities team.

SECTION 8: Furniture, Fixtures and Equipment (FFE) Purchases

The District has approved multiple cooperative agreements for use by the campus community for the purchase of furniture, fixtures, and equipment. These agreements offer end users the most competitive pricing available.

Prior to the purchase of furniture/fixtures (desks, partitions, cabinets, etc.) and certain equipment, please reach out to the Purchasing Supervisor (ACross@palomar.edu) or Director of Business Services (AJensen@palomar.edu) for guidance.

If equipment purchases exceed the annual bid limit threshold, the item(s) must be procured through the formal bid process, unless a cooperative agreement is available. Please work with the Purchasing Supervisor on these types of purchases.

Other important items related to furniture purchases:

- If assembly and/or installation is required, a contract will be necessary.
- If the vendor is installing (affixing) the furniture to District facilities (e.g., floors, walls, ceilings, etc.), the vendor must be on the District's approved CUPCAA list to perform the work. Reach out to Contracts@palomar.edu with questions.
- If there is existing furniture in the space already, the department will need to follow the surplus process in the following section and work with IS and/or Facilities, as well as the Warehouse to remove and the existing items well in advance of the new furniture's arrival.
- If furniture is affixed to the wall/floor/ceiling/ground, departments must work with Facilities to have the item(s) uninstalled (unattached/taken apart) before it is moved out via the surplus process.
- If there is computer equipment or peripherals to be moved/removed, departments must work with IS to remove these items prior to furniture removal. Once technology is moved, then the surplus process can be requested.
- Warehouse staff cannot move IS equipment or uninstall affixed items due to limited tools and equipment. Warehouse staff are able to move items to the surplus storage location once they are ready in preparation for sale.
- It is the responsibility of the department to ensure that arrangements are made for existing furniture/equipment to be moved out in advance of the delivery of new items. Please see the Surplus Equipment process in the following section.

SECTION 9: Surplus Furniture and Equipment

In accordance with Ed. Code 81450, BP 6550, and AP 6550, furniture and equipment may be declared surplus property when it is no longer needed for program purposes, becomes obsolete, broken or is unsafe to use.

Contact the Purchasing Supervisor or Director of Business Services for the procedures used for disposal of surplus equipment. If replacement equipment is being purchased, consideration should always be given to trading the item for credit on the replacement equipment purchased, if possible.

If departments have smaller items (e.g., desk accessories, sorters, small equipment), we recommend asking colleagues whether they can use the items prior to engaging in the Surplus process as there is limited space for these items to be stored until surplus sale

The Surplus Furniture/Equipment Inventory Request Form is completed by the area responsible for the furniture/equipment. Once approved by the department, a copy is forwarded to Fiscal Services (PWang-Smith@palomar.edu) and to the District Surplus Request e-mail (Surplus@palomar.edu). This e-mail is routed to the Purchasing Supervisor, Director of Business Services, and Warehouse staff. Once the form has been reviewed, arrangements will be made to remove the item(s). Depending upon the location and size of the item(s), Facilities or an outside moving company's assistance may be required. Please reach out with any questions to Surplus@palomar.edu. Every effort must be made to plan well in advance for the removal of surplus items, as these activities must be scheduled by the warehouse who has limited staff available to perform these functions.

Once surplus items have been removed, a surplus list is prepared for Board ratification to officially declare the equipment surplus and approve their sale or disposal.