PURCHASING CONTRACT PROCEDURES

Need for service and vendor is identified. Multiple quotes may be required. See Approval Matrix for guidance. NO WORK TO BEGIN UNTIL STEP 5.

START

Are services in excess of the bid limit? BID LIMIT

NO

YES

Contact Purchasing ASAP. A formal public bid may be required. Typical lead time is 3-4 months. Proceed to Step 1 after Purchasing confirms procurement method.

PREPARE CONTRACT
Choose the appropriate District contract template. Complete the contract template before sending to vendor for signature.

- How to Determine the right Contract?
- Contract Templates
- Approval Matrix

CLOSE OUT
Upon completion of services, confirm all invoices are accounted for and paid. If BPO has remaining funds, request Purchasing to close the BPO to unencumber the funds.

GENERATE PURCHASE ORDER
Purchasing processes Purchase Order. Purchasing transmits fully executed contract and Purchase Order to vendor. SERVICES CAN NOW BE RENDERED.

COLLECT REQUIRED SUPPORTING DOCUMENTS:
1. Certificate of Insurance (COI)
2. Proposal or Quote
3. Fully Executed Contract
4. BEC, W9 Form

- Insurance Requirements
- BEC Form
- W9 Form

ENTER REQUISITION
Enter Requisition in Colleague. Upload supporting documents to Square 9. Notify Department Manager and Business Services to approve requisition.

- Requisition Guide
- Square 9 Instructions

REVIEW & APPROVAL
Business Services reviews, approves and notifies Purchasing. Purchasing reviews supporting documentation and works with department to correct deficiencies.