

POCKET PURCHASING GUIDE

MISSION OF THE PURCHASING DIVISION: The mission of the Purchasing Division is to ensure the cost effective, efficient, and timely procurement of the necessary goods and services to enable all County departments to achieve their missions, goals and objectives, and effectively deliver services to the residents of the County of Durham. Further, it is the responsibility of the Purchasing Division to ensure that all procurement activity is conducted in compliance with applicable State and Federal laws and regulations, local ordinances and approved policies and procedures.

The Division provides value-added services to:

- procure the goods and services necessary for all County staff to meet their goals and objectives as efficiently and cost effectively as possible;
- protect the interests of the County;
- ensure legal compliance in all contractual relationships;
- provide a fair climate for suppliers;
- ensure compliance with the County's MWBE Ordinance;
- provide knowledgeable advice and consultation;
- assist in specification development and review;
- maintain high ethical business standards and full statutory compliance;
- provide continuous training and education to our clients;
- minimize disputes between internal and external clients;
- identify sources of supply at cost effective prices and serve as an information resource center;
- manage requests within reasonable time frames and with a positive customer service attitude;
- disposal of surplus property.

REQUISITIONS: The SAP on-line purchase requisition is the key document that begins the procurement process. The following information is necessary for expeditious processing of your purchase request:

- adequate specifications;
- item description, part number;
- quantity;
- required delivery time;
- complete accounting data;
- requestor and authorized approving signature thru workflow;
- vendor name, address, code number;
- line item and total purchase cost;
- special delivery location instructions.

NOTE: Procurement of services will be processed by the Purchasing Division using the SAP Funds Reservations function. Please contact our Contracts Officer at **560-0071** for further details relating to contracts.

PROCUREMENT METHODS: Informal and Formal Bid procedures are typically used to purchase goods, services, repair, and construction. The amount of time required to process an order varies, but routine purchases should be complete within three (3) working days. A minimum of thirty (30) days administrative lead time (processing time after receipt of department's scope of work) is required for all Formal Bids and Requests for Proposals.

When competition is required, a minimum of three sources is preferred with at least one of these being a Minority and Women Business Enterprise (M/WBE) source.

THRESHOLDS FOR PURCHASING: An SAP on-line purchase requisition and purchase order are required for all purchases of goods \geq \$1,000.00. For all construction and for most repairs and other services, a contract is required in addition to a Funds Reservations.

THRESHOLDS FOR GOODS	MINIMUM REQUIREMENTS
<\$1,000	Procurement Card, Request for Check, Petty Cash, (No competition required).
\geq \$1,000 - <\$30,000	No competition required with the exception of Fixed Assets . User department encouraged to solicit quotes for competitiveness when possible
\geq \$30,000 - <\$90,000	Informal Bids by Purchasing Div.
>\$90,000	Formal Bids by Purchasing Div., Board approval required.
Thresholds for Services	Minimum Requirements
<\$30,000	No competition required. User department encouraged to solicit quotes for competitiveness when possible.
\geq \$30,000 - <\$39,999	Informal Bids by Purchasing Div.
\geq \$40,000	Formal Request for Proposals by Purchasing Div., Board approval required.
Architect, Engineer or Surveyor Services	"Best qualified" selection process by Purchasing Div., Board approval required. (Exempted by Board if < \$50,000)
Thresholds for Construction and Repair	Minimum Requirements
<\$30,000	No competition required. User department encouraged to solicit quotes for competitiveness when possible
\geq \$30,000 - < \$500,000	Informal Bids by Purchasing Div.
\geq \$500,000	Formal Bids by Purchasing Div., Board approval required.
<\$30,000	No competition required. User department encouraged to solicit quotes for competitiveness when possible

In addition to Informal and Formal Bid Process, the following procurement methods are also available:

STATE CONTRACTS: State Contracts are established by the State Division of Purchase and Contract to obtain more favorable prices through volume purchasing, reduce lead time and administrative effort.

GSA CONTRACTS: NC G.S. 143-129(e) Creates an exemption for purchases in the formal range from contracts established by the federal government for any federal agency if the contractor is willing to extend the same or more favorable prices, terms, and conditions.

EMERGENCY PROCUREMENTS: NC G.S.143-129 allows for an exception to the Formal Bid procedure “in cases of special emergency involving the health and safety of the people or their property”. Emergency purchases must be documented to the Purchasing Manager in addition to obtaining a Purchase Order.

SOLE SOURCE PURCHASES: Sole Source is available “when performance or price competition for a product are not available; when a needed product is available from only one source of supply; or when standardization or compatibility is the overriding consideration”. All sole source purchases require Board approval.

PIGGYBACKING: NC G.S. 143-129(g) allows municipalities, counties, or other subdivisions to piggyback for supplies, materials, or equipment (not services) from another entity that has within the previous 12 months, completed a formal bid process, to purchase similar supplies, materials, or equipment if agreed upon by the vendor. Piggybacking requires Board approval and advertisement of intent to award.

PROCUREMENT CARD PROGRAM: The County has entered into a contract with Bank of America to provide procurement cards for small dollar purchases. The use of the Procurement Card is for Official County business only.

PROCUREMENT OF COMPUTER HARDWARE AND SOFTWARE: All requisitions for computer hardware and software shall have prior approval from the Director of Information Services & Technology.









ORDER SPLITTING PROHIBITIONS: Dividing contracts or purchases in order to evade procedures is prohibited under NC G.S. 143-133.

PERSONAL PURCHASE: Use of County purchasing authority for personal purchases is prohibited.

CODE OF ETHICS: The staff of the Purchasing Division is committed to the following Code of Ethics:

- to conduct all purchasing activities in accordance with the applicable NC General Statutes, county policies and procedures, ordinances, and federal rules and regulations;
- develop and maintain good public, supplier and internal relationships;
- to ensure fair and open competition by ethical means;
- to uphold the practices and principles of the professional purchaser;

- to extend honest, courteous and impartial treatment to all interested suppliers;
- to maintain supplier confidence to extent permissible;
- to respect the authority of the department and not use it for personal advantage or gain

PURCHASING STAFF	
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When in doubt as to the correct procedure for any procurement, call the Purchasing Division prior to making contact with vendors or sales representatives. The Procurement Staff welcomes the opportunity to assist you in all your procurement needs.

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