

Measure A—Procurement Requirements

1. PURPOSE

To provide procedures for Measure A purchases.

2. SCOPE

This procedure applies to all personnel at the Peralta Community College District (PCCD) who purchase goods and services with Measure A funds.

3. OVERVIEW

On June 6, 2006, the Alameda County voters passed a \$390 million Measure A bond allowing the District to renovate classrooms, build new science and technology labs, and modernize its facilities. A complete listing of all bond projects is listed on the website for PCCD's Department of General Services. On January 16, 2007, the Board of Trustees approved five spreadsheets listing specific Measure A Instructional (and non-Instructional) Equipment and Furniture Needs for each campus and the District, that can be purchased utilizing Measure A funds. (These spreadsheets are available on the website for PCCD's Department of General Services.) Only items approved on January 16, 2007, and items subsequently approved by the Board of Trustees, are allowed to be purchased utilizing Measure A funds. All Measure A purchases are subject to Bond Oversight Committee audits and require special forms to be approved by the College President, Vice Chancellors, and the Chancellor, before any items can be purchased. All Measure A purchases must follow the District's Purchasing Procedures and must have the proper Measure A procurement forms. This procedure explains these requirements.

4. REFERENCES

- 4.1 *Peralta Community College District—Purchasing Procedures*
- 4.2 *Board Resolution 05/06-45—(available on the website for PCCD's Department of General Services) outlines the Measure A bond requirements*
- 4.3 *PowerPoint Presentation—Overview of Measure A Procurement Procedures*
- 4.4 *Flow Diagram—Measure A Process*
- 4.5 *Form—Instructional Furniture & Equipment Procurement Request Form (for Campuses)*
- 4.6 *Form—Furniture & Equipment Needs Procurement Request Form (for District)*
- 4.7 *Form—Construction Project Request Form (for All Sites)*
- 4.8 *SOP09 — Requesting a Purchase Order for Goods*

5. DEFINITIONS AND ABBREVIATIONS

- Buyer – District personnel working in the Purchasing Department whose formal job title is “Buyer” or “Assistant Buyer” (personnel working at the campuses are not Buyers).
- Bid Recap – A Bid Recapitulation is a sheet used to summarize the quotes received by a Requestor.
- PO – Purchase Order
- PROMT – Peralta Real-time Online Management Technologies (PeopleSoft/Oracle computer system).

- Requestor or Requisitioner – District/College personnel authorized to initiate a purchase requisition.

6. PURCHASING GOODS AND SERVICES WITH MEASURE A FUNDS

All Measure A purchases must follow the District's Purchasing Procedures and are subject to Bond Oversight Committee audits. All Measure A purchases require special forms to be approved by the College President, Vice Chancellors, and the Chancellor, before any items can be purchased. Only items approved on January 16, 2007, (and items subsequently approved) by the Board of Trustees are allowed to be purchased utilizing Measure A funds.

Before any item can be purchased, the item must be listed on one of the five spreadsheets approved by the Board of Trustees (available on the website for PCCD's Department of General Services), and must have one of the below approved Measure A Forms accompanying the purchase:

- Instructional Furniture & Equipment Procurement Request Form – for Campuses
- Furniture & Equipment Needs Procurement Request Form – for District
- Construction Project Request Form – for All Sites

This procedure explains the Measure A forms and their use. After the forms have been approved, the requestor can proceed to generate a purchase requisition (in the PROMT system) following the normal purchasing procedures. For detailed step-by-step purchasing procedures see SOP09 — *Requesting a Purchase Order for Goods*.

7. INSTRUCTIONAL FURNITURE & EQUIPMENT PROCUREMENT REQUEST FORM

This form is to be used by the Campuses only to request approval to purchase items listed on the campus Measure A spreadsheets. Only items listed on the Measure A spreadsheets will be approved to be purchased. All Measure A purchases must have an approved Measure A–Instructional Furniture & Equipment Procurement Request Form before the Buyer can issue the PO. Once the form has been approved by the Chancellor, the Requestor generates a purchase requisition (in the PROMT system) so that the Buyer can issue a PO. Below are steps involved:

- 7.1 To purchase any item(s) listed on a campus Measure A spreadsheet, each campus must complete Section I and Section II of this form. Instructions for completing this form are on the cover sheet of the form.
- 7.2 Follow all normal purchasing procedures in obtaining quotes, providing backup documentation, and completing the Bid Recap sheet. For purchases greater than \$2,500 and under \$10,000, only one written quote is required; for purchases between \$10,000 up to \$78,900 (or the current bid threshold adjusted annually by the Price Deflation Index), three written quotes are required. For purchases above \$78,900, you must contact the Purchasing Department to conduct a formal bid with specifications you provide, and to obtain Board approval.
- 7.3 After completing Section I and Section II, route the form to the Department of General Services for approval by the Vice Chancellor of General Services, the Vice Chancellor of Finance, and the Chancellor. (See *Flow Diagram–Measure A Process*, for the detailed

approval process for Measure A forms.) General Services will return all approved forms to the Campus Business Office.

- 7.4 After the Measure A form has been approved, the Requestor must generate a purchase requisition (in the PROMT system) for the issuance of a Purchase Order. Forward a copy of all quotes received and a copy of the Bid Recap sheet to the Measure A Buyer in the District Purchasing Department. Purchasing cannot issue a PO without BOTH the approved Instructional Furniture & Equipment Procurement Request Form AND the required backup quotes and Recap sheet.

8. FURNITURE & EQUIPMENT NEEDS PROCUREMENT REQUEST FORM

This form is to be used by the District Offices only to request approval to purchase items listed on the District Measure A spreadsheet. Only items listed on the Measure A spreadsheets will be approved to be purchased. All Measure A purchases must have an approved Measure A– Furniture & Equipment Needs Procurement Request Form. Once the form has been approved by the Chancellor, the Requestor generates a purchase requisition (in the PROMT system) so that the Buyer can issue a PO. Below are steps involved:

- 8.1 To purchase any item(s) listed on the District Measure A spreadsheet, each District Office must complete Section I and Section II of this form. Instructions for completing this form are on the cover sheet of the form.
- 8.2 Follow all normal purchasing procedures in obtaining quotes, providing backup documentation, and completing the Bid Recap sheet. For purchases greater than \$2,500 and under \$10,000, only one written quote is required; for purchases between \$10,000 up to \$78,900 (or the current bid threshold adjusted annually by the Price Deflation Index), three written quotes are required. For purchase above \$78,900, you must contact the Purchasing Department to conduct a formal bid with specifications you provide, and to obtain Board approval.
- 8.3 After completing Section I and Section II, route the form to the Department of General Services for approval by the Vice Chancellor of General Services, the Vice Chancellor of Finance, and the Chancellor. (See *Flow Diagram–Measure A Process*, for the detailed approval process for Measure A forms.) General Services will return all approved forms to the appropriate District Office.
- 8.4 After the Measure A form has been approved, the Requestor must generate a purchase requisition (in the PROMT system) for the issuance of a Purchase Order. Forward a copy of all quotes received and a copy of the Bid Recap sheet to the Measure A Buyer in the District Purchasing Department. Purchasing cannot issue a PO without BOTH the approved Furniture & Equipment Needs Procurement Request Form AND the required backup quotes and Recap sheet.

9. CONSTRUCTION PROJECT REQUEST FORM

This form is to be used to request new construction projects NOT listed on either the Short-Term Construction Projects spreadsheet or the Short-Term Construction Projects Phase II spreadsheet (available on the website for PCCD's Department of General Services). All construction projects must be approved by the Department of General Services before any work can be done. Construction projects are considered "Public Works" projects under Public Contract Code, and must be coordinated with the Department of General Services, and the District Purchasing Department. Payment of prevailing wages is required for all projects exceeding \$1,000, and the District's Project Labor Agreement applies.

9.1 The requestor must complete Section I and Section II of this form and forward the form to the Department of General Services for approval. Instructions for completing this form are on the cover sheet of the form.

9.2 Do not undertake any construction projects without the Department of General Services' approval. If the form is approved, the Department of General Services will assign a Project Manager to handle the coordination of the project.

10. TO PURCHASE ITEMS NOT LISTED ON THE MEASURE A SPREADSHEETS

If the College or District Office does not wish to purchase the items listed on the spreadsheets or wishes to substitute items, the College and or District Administrators must contact the Vice Chancellor of General Services to request a substitution. The Vice Chancellor of General Services will evaluate each request on a case-by-case basis and determine the next steps. For major substitutions, the Board of Trustees will have to approve the substitution.

11. ATTACHMENT

- *Flow Diagram*–Measure A Process