

Wellesley College Purchasing Policy

(Effective October 2009, Updated 8/8/2018)

Purchasing Policy Overview	2-4
Policy for Purchases under \$10,000	7
Procurement Value Table	7
What's Needed at Each Level	7
Purchases under \$10,000	7
Policy for Purchases of \$10,000 or More	8
Purchases between \$10,000 and \$250,000	8
Competitive Bid Summary and Justification (Form A)	10
No Bid Justification (Form B)	11
Request for Proposal (RFP) Process (over \$250,000)	9
Appendix "A"	5
College-Wide Suppliers	
Appendix "B"	6
Common Goods & Services Chart	6
Appendix "C"	7
Policy for Purchases under \$10,000	7
Appendix "D"	8
Policy for Purchases of \$10,000 or More	8
Appendix "E"	9
Policy for Purchases over \$250,000	9
Appendix "F"	10
Competitive Bid Summary and Justification (Bid Form A)	10
Appendix "G"	11
No Bid Justification (Bid Form B)	11

Introduction

The Purchasing Department and the Controller's Office are jointly responsible for the purchasing and payables functions of Wellesley College. Generally, within guidelines described in this Purchasing Policy, department representatives may initiate purchases covered by funds approved in their budgets.

Note: Effective FY2019, starting on July 1, 2018, Wellesley College will follow the Uniform Guidance Procurement Standards (2 CFR §200) for purchases made with federal funds. Please refer to the [Federal Funds Purchasing Policy](#) for detailed information about the requirements and procedures for purchases made with federal funds.

If you have any questions about this Purchasing Policy, please contact the Purchasing Department.

Acquiring Goods and Services

There are different methods for securing the purchase of goods and services at Wellesley College, depending on dollar amount and the complexity of the purchase.

Contracted Suppliers

Wellesley College contracts for certain commodities and services on a college-wide basis with particular suppliers for the best quality, service and price. The college is also a member of several higher education purchasing consortia that have contracts with many local and national suppliers. Should you have a question or need assistance in making a purchasing decision, please feel free to contact the Purchasing Department. Departments are strongly urged to make use of the contracted suppliers whenever possible. Please refer to **Appendix "A"** for supplier contracts and the applicable contact information. Departments should contact the vendors directly for these purchases.

Department Coordinated

The purchase of certain items / services must be coordinated and/or ordered by other departments due to its special needs. Please consult the chart in **Appendix "B"** for a summary of these items and services and contact the department directly to make these purchases.

All Other Purchases

The purchasing policy for goods and services which are not categorized as Contracted Suppliers or Department Coordinated depends upon the annual dollar amount. The Purchasing Policy table (below) clarifies the departmental acquisition responsibilities within each dollar range.

Purchasing Policy

Annual Dollar Value	Required Documentation	Process Managed By
Under \$10,000	None Required	N /A
\$10,000 to \$250,000	Three written price quotes are required. They should be documented on a Bid Form and attached to a Workday requisition.	Department

Over \$250,000	A formal Request for Proposal (RFP) process. The results should be documented on a Bid Form and attached to a Workday requisition.	Purchasing Department
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As a matter of Wellesley College policy, higher dollar acquisitions require more documentation to better demonstrate the basis for awarding College contracts and certify that appropriate sources have been selected and all prices paid are fair and reasonable. These acquisitions are audited to a stricter standard and it is the Purchasing Department's responsibility to ensure that all related documentation adheres to Wellesley College's policies.

When departments are dealing with vendors during a competitive process, it's important to conduct a fair and ethical process. Here are some key points to remember:

- All vendors must be provided with the same information and deadlines to avoid any advantages for any vendor.
- No information on the bids submitted (especially price) may be disclosed to the other competing vendors except for the name of the company.
- You should not tell any vendor the amount that should be submitted.
- You should not allow any vendor to unilaterally resubmit a bid. Resubmission bid requests must include all vendors. ("Best and Final Offers" are allowed as part of final pricing negotiations)

The above table is applicable for all goods and services with the exception of certain categories that are exempt from the competitive process. Contact Purchasing if you have any questions as to whether or not your purchase will require solicitation of competitive pricing. The exempt categories include:

- **Honoraria and fees for entertainers**
- **Investment management services**
- **Educational program expenditures (e.g., study abroad programs)**
- **Fringe-benefit related**
- **Taxes and payments to government agencies**
- **Legal and audit fees**
- **Membership fees and subscriptions**
- **Insurance**
- **Utilities**
- **Sub-recipients under sponsored research grants**

Annual Dollar Value under \$10,000

In general purchases under \$10,000 do not require written price quotes. However, we encourage departments to contact several vendors in order to obtain the best price and quality especially for purchases that exceed \$5,000. Departments are responsible for contacting the vendors, negotiating the price and processing the invoices. You do not need to contact the Purchasing Department to make these purchases and no purchase order is required. See **Appendix "C"** for more details on these purchases.

Annual Dollar Value between \$10,000 and \$250,000

Three written price quotes are required for purchases between \$10,000 and \$250,000. The process is managed by the department.

The three price quotes should be documented on a Bid Form and Attached to a Workday requisition. The Purchasing Department will review the Workday requisition and the attached documentation for compliance with this policy. The department should not commit to placing an order until the Workday Requisition has been reviewed and the Purchasing Department creates and issues a Workday Purchase Order.

Please see **Appendix “D”** for details. See also **Appendix “F”** and **Appendix “G”** for Wellesley College Bid Documentation Forms.

Annual Dollar Value over \$250,000

Competitive bids for purchases over \$250,000 must be obtained via a formal Request for Proposal (RFP) process as directed by the Purchasing Department. The process is designed to better position Wellesley College in the marketplace by the steps involved, and practices employed, in the planning, contracting, implementation, acceptance and follow-on activities of the acquisition of goods and services.

Departmental planning and forecasting is required as the Purchasing Department must schedule the acquisition needs of all Wellesley College departments.

The requesting department will bear most of the responsibility for the results from the planning, implementation, and follow-on phases of the acquisition, while the Purchasing Department is most accountable for the results coming out of the contracting and negotiation phases of the acquisition process.

Please see **Appendix “E”** for details.

Appendix “A”

College-Wide Suppliers

Please refer to “Vendor Info” on the Purchasing website and the Wellesley College Marketplace.

Appendix “B”

Common Goods & Services

Certain items are coordinated and ordered by departments outside of the Purchasing Department. Please consult the following chart for a summary:

Item	Responsible Department
Computer equipment and peripherals	Library & Technology Services
Software	Library & Technology Services
Food supplies / Catering	Dining Services / Wellesley College Club
Scientific equipment and supplies	Science Center
Library book and subscriptions	Clapp Library
Printing	Printing Services
Copy Services / Copiers	The Copy Center
Record Storage	Distribution Center
Event Rental	Special Events
Tent Rental	Special Events
Storage Containers	Facilities Management
Pest Control	Facilities Management
Carpeting / Floor Mats	Facilities Management
Vehicles	Facilities Management
Space management / construction expenditures	Facilities Management
Appliances	Facilities Management

Appendix “C”

Policy for Purchases under \$10,000

There are different methods for paying the invoices for purchased goods and services, depending on dollar amount. The Procurement Value Table below shows the various methods for acquiring goods and services with explanations of each category following.

Procurement Value Table

Dollar Value	Petty Cash	ProCard	Direct Pay Invoice	Purchase Order
Less than \$50	recommended	recommended	not recommended	not recommended
\$50 to \$999	not available	recommended	recommended	not recommended
\$999 to \$4,999	not available	recommended	recommended	available
\$5,000 to \$9,999	not available	recommended	recommended	available

What’s Needed at Each Level

Purchases less than \$50

The College gives you two ways to procure items totaling \$50 or less: use your own cash or credit card, then to receive reimbursement:

1. Submit the original sales slip with a petty cash request to the Cashier in the Controller’s Office. The Cashier will give you cash on the spot; or
2. Submit the original sales slip with a check request to the Controller’s Office. A check will be deposited into your account in about five to seven business days.

Alternatively, you can use your ProCard to pay for any item that falls under the SPL (Single Purchase Limit).

Purchases between \$50 and \$9,999

The Wellesley College ProCard is the recommended form of payment for all departmental orders under \$1,000. For vendors that do not accept credit cards, some will allow you to charge your purchase to a Wellesley account. In these situations, the supplier sends an invoice to the College and a purchase order is not required. The invoice should be submitted as an attachment to a Workday Supplier Invoice Request.

Purchase orders are generally not available for purchases under \$5,000. Exceptions are made for suppliers that require a purchase order. Please submit a Workday Requisition to obtain a Workday Purchase Order.

Appendix “D”

Purchases between than \$10,000 and \$250,000

Three written quotes are required for purchases between \$10,000 and \$250,000. These quotes should be obtained by the department, documented on a Bid Form and attached to a Workday Requisition. The department should not commit to placing an order until the Workday Requisition has been reviewed and the Purchasing Department creates and issues a Workday Purchase Order.

Quotes should be obtained in writing and can include screen shots from websites, copies of published price lists and advertised pricing in established magazines or journals.

The following summarizes the two types of Bid Forms:

I. Competitive Bid Summary and Justification (Form A)

Once all bids have been reviewed, complete the Competitive Bid Summary and Justification (Form A). A justification will be required if the bid is awarded to a vendor that is higher in cost than the lowest bid by either 15% or \$10,000, whichever is lower, and must be approved by the department head.

II. No Bid Justification (Form B)

If competitive quotes were not obtained for purchases between \$10,000 and \$250,000, the No Bid Justification (Form B) must be completed with the appropriate department head approval.

Please note that “Preferred Vendors” are not “Sole Source Vendors”. A “sole source” is defined as specific products or services available from only one source. The fact that a particular vendor is an excellent fit for Wellesley College does not justify the selection of that vendor as a “sole source” if there are other vendors that provide the same or similar goods and services.

Box C should only be selected in emergency or other rare situations and a detailed justification is required as well as department senior staff and VP of Finance signature approvals.

Appendix “E”

Purchases over \$250,000

A Request for Proposal (RFP) process (with three vendors) is required for purchases over \$250,000. The department works collaboratively with the Purchasing Department and other stakeholders. It is important that departments with procurement needs in excess of \$250,000 be in contact with the Purchasing Department at the earliest possible opportunity to help ensure that there is adequate time and resources committed to this bid particularly:

- When the product or service in question is not a “Sole Source”
- When a complex “scope of work” or complicated contract terms are involved
- When the total projected value of the vendor relationship exceeds \$250,000.

The RFP Process is outlined below:

1. Form Team
 - All Stakeholders (At a minimum, representatives from End User / Requesting Department and Purchasing. Other participants (Finance, IS and Senior Staff) are included as needed.
2. Establish Decision Criteria
 - Decide Results or Resources deal
 - Collect objectives
 - Issue Request for Information (RFI) — if necessary
3. Obtain Senior Staff Approval / Advisement of Progress
 - Prioritize College objectives
 - Prepare RFP elements
4. Develop RFP Timeline
 - Customer contract tailored to the deal
 - Include with the Request for Proposal
5. Issue Request for Proposal
6. Conduct Bidders’ Conference – if necessary
7. Evaluate Potential Vendors
8. Final Negotiations and Vendor Selection
9. Develop Contract
10. Issue Purchase Order
11. Manage the Contract

The RFP results should be documented on a Bid Form and attached to a Workday Requisition. The department should not commit to placing an order until the Workday Requisition has been reviewed and the Purchasing Department creates and issues a Workday Purchase Order.

