

# PARTNERING WITH PURCHASING



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Visit us online at [www.smc.edu/purchasing](http://www.smc.edu/purchasing)

## Partnering with Purchasing

### Our Mission

The mission of the Santa Monica College Purchasing Department is to provide efficient and responsive procurement services and to obtain high quality goods and services at reasonable costs, while operating at the highest standards of ethical conduct.

The Purchasing Department is responsible for the procurement of materials, equipment, and services for the College. Our objective is to obtain the best quality products and services for the best price, in a fair, open and competitive manner in compliance with California state statutes and College policies.

Do not hesitate to call when you need assistance.

### Contact Us

Call us at (310) 434-4304 or visit us at [www.smc.edu/purchasing](http://www.smc.edu/purchasing)

### Purchasing Staff

Cynthia Moore	Director	4305	Moore_cynthia@smc.edu
Cindy Ordaz	Admin. Asst.	8170	Ordaz_cindy@smc.edu
Sandy Franke	Buyer	4509	Franke_sandra@smc.edu
Nyla Cotton	Buyer	4495	Cotton_nyla@smac.edu

### Warehouse/Receiving & Mailroom Staff

Roberto Jauregui	Manager	4477	Jauregui_roberto@smc.edu
Darrell Heximer	Warehouse	4476	Heximer_darrell@smc.edu
Luis Martin	Warehouse	4477	Martin_luis@smc.edu
Robert Villanueva	Warehouse	4477	Villanueva_robert@smc.edu
Rudy Henry	Mailroom	4437	Henry_rudy@smc.edu
Fredrick (Rick) Young	Mailroom	4437	Young_fredrick@smc.edu

# Partnering with Purchasing

## What We Do

### Supply Agreements

- Commodity Contracts
- Leverage District's purchasing power
- Collaborate with other District's, municipalities, State and Local Government

### Monitor Compliance

- Policy
- Legal
- Promote Best Practice

### Purchasing Policy

- To provide framework to ensure we get the best value for academic purpose and meet legal ethical obligations.

### Ensure Best Policy

- Wide supply contracts for broadly used commodities and services
- Informal Quotes on purchases over \$2000.00
- Formal Bids (IFB or RFP) on purchases exceeding \$84,300.00

### Legal and Ethical Obligation

- Publically Funded + Institution = Rigorous Standards
- Arms length business relationships
- Competitive bids
- Bid evaluation process that is open to public scrutiny

## How do we buy goods?

### Purchasing Methods

- Purchase Orders
- Blanket Orders
- Pricing Agreements
- Contracts

## What is a Piggy-back?

### Use of other Agency Agreements:

- PCC 20652
- Requires prior approval by the Board of Trustees
  - CMAS, WSCA, NJPA, State of Calif. DGS, GSA Schedules
  - E and I Cooperative, FCCC (Foundation For California Community Colleges)
  - CMAS and Price Schedules require further negotiation

## How do you manage Suppliers/ Vendors and the bidding process?

The Santa Monica College District uses PlanetBids, an electronic vendor portal that allows suppliers to register their business, search for bids and request for quotes/ proposals, order and download documents electronically, bid electronically (where applicable), and much more!

For more information visit our Business Opportunities link at [www.smc.edu/purchasing](http://www.smc.edu/purchasing).



# Partnering with Purchasing

## Procurement Transaction Levels and Authority

Type of Purchase	Total Amount of Purchase	Quote or Solicitation Requirements	Purchase Order or Contract Type	Authority
Minor Purchases for equipment, leases, rentals, materials and supplies (Non Consulting Services)	\$1- \$1,999	Solicitation of quotes on Planet-Bids (24 hours)	Purchase Order	Purchasing
Purchases for equipment, leases, rentals, materials, and supplies (non-consulting services)	\$2,000- \$4999	Solicitation of quotes on Planet-Bids (48 hours)	Purchase Order	Purchasing
Purchases for equipment, leases, rentals, materials, and supplies (non-consulting services)	\$5,000- 83,399	Informal Quotes Solicitation of (3) or more written quotations or proposals	Purchase Order	Purchasing
Formal Competitive Purchases, Materials, Supplies, Non Consulting Services	\$83,400+	Competitive Bid or RFP conducted on Planet Bids	After BOT approval, purchase order and/or contract Issues	Purchasing
Public Contract Code: 20651				

## Procurement Transaction Levels /Public Works

Type of Purchase	Total Amount of Purchase	Quote or Solicitation Requirements	Purchase Order or Contract Type	Authority PCC1101
Public Works-Minor facilities construction, alteration, renovation, demolition, painting or repair	\$1,000- 5000	One written quotation from a licensed contractor obtained using approved format	Contract Issued Purchase Order Issued to encumber funds	Facilities & Purchasing
Public Projects: Request for Quote (RFQ) (as above)	\$5001- \$14,000	Solicitation of 3 or more written price quotations from Licensed Contractors	Contract Issued Purchase Order issued to encumber funds	Purchasing
Public Projects	\$15,000	Formal advertising Solid Specifications Job Walks Bonding Prevailing Wages Insurance, Licenses	After BOT approval contract issued, Purchase Order generated to encumber funds	Purchasing

A complete Buyer Commodity Listing is available at [www.smc.edu/purchasing](http://www.smc.edu/purchasing).

Contact **Sandy Franke** at x4509 for :

- Athletic Equipment, Supplies and related apparel
- Audio Visual Equipment, Supplies, Services
- Book Binding
- Books/Periodicals (DVD's) Subscriptions
- Carpet/Flooring (materials and installation)
- Catering/Food Services
- Conferences
- Electrical Equipment, Supplies
- First Aid and safety equipment and supplies
- Gases, Industrial, Scientific, Medical including propane
- Instructional Supplies
- Janitorial Supplies, Services (Cleaning agents, brooms, detergents mops, Paper Goods, floor care
- Laboratory Supplies, Equipment
- Medical Supplies/Equipment, Services
- Memberships
- Music Instruments, Supplies, Services
- Office Supplies and Equipment (including shredders, fax machines)
- Pharmaceutical Supplies, Services
- Photographic Equipment, Supplies Services
- See complete list at [www.smc.edu/purchasing](http://www.smc.edu/purchasing)

# Partnering with Purchasing

## Procurement Transaction Levels/Professional

Type of Purchase	Total Amount of Purchase	Quote or Solicitation Requirements	Purchase Order or Contract Type	Authority
Professional Services/ Independent Contractor (Consulting)	\$1,000-5000	None for specialists (e.g. instructional services, lawyers, doctors, engineers, architects, but it is preferable to request competitive pricing from several suppliers	Professional Services Agreement approved by Director of Purchasing or VP	Ratification by Board of Trustees, Purchasing executes contract
Professional Services/ Independent Contractor (Consulting)	\$5001-\$50,000	Specialists (e.g. instructional services, lawyers, doctors, engineers, architects) selected by RFQ process.	Contract Issued Purchase Order issued to encumber funds	Ratification by Board of Trustees Purchasing executes contract
Professional Services	\$50,000+	Formal RFP conducted by Purchasing	After BOT approval contract issued, Purchase Order generated to encumber funds	Board Approval, Purchasing executes contract
Textbooks, Library Books, Instructional Software, films, testing, materials periodicals for Library Services or for resale by College Bookstore	ALL	None per Education Code 81651, but is preferable to request competitive pricing	Purchase Order	Purchasing



A complete Buyer Commodity Listing is available at [www.smc.edu/purchasing](http://www.smc.edu/purchasing).

Contact **Nyla Cotton** at x4495 for :

- Acoustical tile, insulating materials and supplies
- Affiliation Agreements
- Architect/Engineer Contract Review, Services
- Audit Services
- Building Materials, Bricks, Cement, Hand Tools, Ladders, Lumber, etc.
- Buildings, Structured (Fabricated and Pre-Fabricated)
- Consulting Agreements
- Cosmetology Supplies/Services
- Credit Card Processing
- Earth Moving Equipment (tractors, loaders, graders, dozers, etc.)
- Elevator Agreements/Services
- Energy Agreements (to include Solar)
- Equipment Leases
- Financial Services
- Fire/Alarm Services, Sprinkler Inspection and Testing
- Food Service Agreements (Campus Food Vendors)
- See complete list at [www.smc.edu/purchasing](http://www.smc.edu/purchasing)





## Partnering with Purchasing

### Purchasing Steps

- Prior to submitting a requisition, check the account to make sure that there are funds available to cover the expense.
- If funds are insufficient, please contact Fiscal Services.
- Complete a Purchase Requisition utilizing the PDF fill-able Requisition Form. (Available on the Purchasing Website at [www.smc.edu/purchasing](http://www.smc.edu/purchasing))

### Approval Steps

1. Requestor
2. Department Head/Administrator
3. Vice President
4. Fiscal Services verifies account number, funding compliance and availability
5. Purchasing

\* Requisitions for computer hardware, software, multi-media, or any wireless equipment which interfaces with our network **MUST** be reviewed and approved by IT.

### Santa Monica Community College District REQUISITION

Fiscal Year:	<input type="text"/>	Fiscal Services Use Only:	
Requisition No:	<input type="text"/>		
Department:	<input type="text"/>		
Location No.:	<input type="text"/>	Purchasing Use only:	
Requestor:	<input type="text"/>		
	Printed Name      Signature      Ext.      Date		
Approver:	<input type="text"/>		
	Printed Name      Signature      Ext.      Date		
VP:	<input type="text"/>		
	Printed Name      Signature      Ext.      Date	Deliver To Dept.:	<input type="text"/>
Fiscal Svcs:	<input type="text"/>	Name/Ext.:	<input type="text"/>
	Printed Name      Signature      Ext.      Date	Bldg. Rm.:	<input type="text"/>

STANDARD COMMENTS/NOTES						

FUND	RES. PRJY	GOAL	FUNC/LOC	OBJECT	SCH/LOC/ACTIVITY	AMOUNT

LINE NO.	QUANTITY	UOM	UNIT PRICE	EXT PRICE	CATEGORY	DUE DATE
1				\$ 0.00		

Item Description	
------------------	--

LINE NO.	QUANTITY	UOM	UNIT PRICE	EXT PRICE	CATEGORY	DUE DATE
2				\$ 0.00		

Item Description	
------------------	--

LINE NO.	QUANTITY	UOM	UNIT PRICE	EXT PRICE	CATEGORY	DUE DATE
3				\$ 0.00		

Item Description	
------------------	--

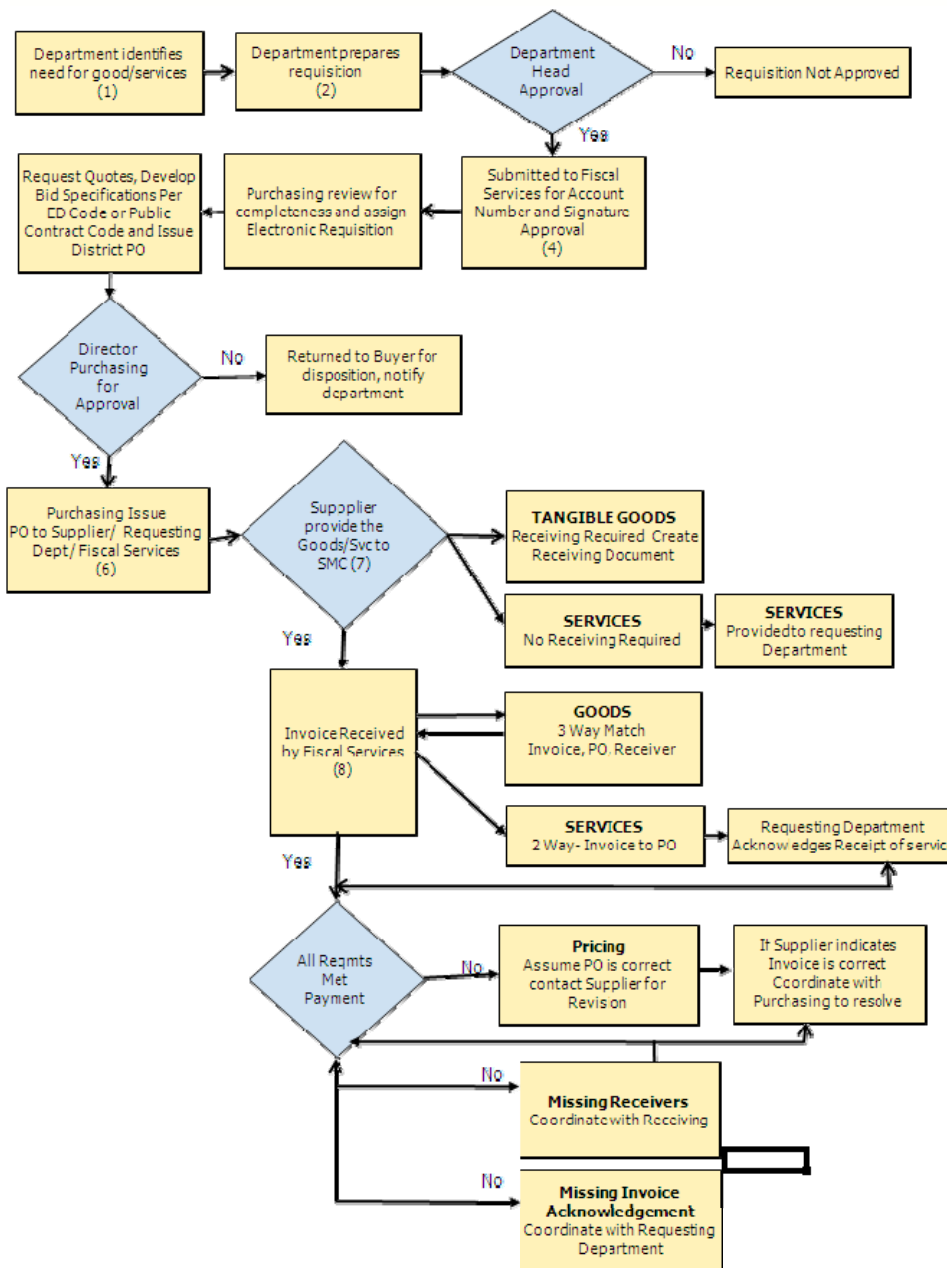
<b>SUGGESTED SUPPLIER:</b>	
Name: <input type="text"/>	Extension Price: \$ 0.00
Address: <input type="text"/>	*Tax: <input type="text"/>
City, State, Zip: <input type="text"/>	*Shipping: <input type="text"/>
Telephone: <input type="text"/>	Fax: <input type="text"/>
Contact: <input type="text"/>	Email: <input type="text"/>
Total: <input type="text"/>	

\*Note: For your internal reference only. In PSFB tax and freight are encumbered only on the Purchase Order.

This form is available on our website at [www.smc.edu/purchasing](http://www.smc.edu/purchasing). Watch our video tutorial online.

- Completely fill out and print/save for your records.
- Contact the Commodity Buyer if you have any questions regarding your order (see Buyer Commodity Listing online).

# Partnering with Purchasing



## How is a purchase order changed?

- Decreasing the amount of an Open Purchase Order is done by sending an email to the Buyer who created the purchase order indicating the amount of the decrease.
- Request to cancel a line item on a purchase order by sending an email request to the Buyer that created the purchase order.
  - If the item has not yet been received by the warehouse and the supplier has not yet shipped the item, the line can be cancelled.
- Adding or removing authorized users to an open purchase order.

## Change Order Increases?

When increasing funds to an open purchase order or adding another line item to an existing purchase order, a new requisition must be prepared and sent through the approval process

## How do I cancel an order?

Send an email to the Buyer that issued the purchase order. The buyer will issue a change order/cancellation and forward to the supplier.

## Is the Purchase Order for an Emergency?

That would depend on the nature of the emergency

- Yes- If it is determined that goods or services are needed so that the education function can continue.
- No- If it is because the requisition was not submitted for processing in a timely manner.

## What is First Class Mail?

All mailable matter can be mailed as first class:

- No minimum quantity or weight
- Maximum weight of mailable matter is 13 ounces
- Letter maximum weight: 3.5 ounces
- Hand written or typewritten material that is sealed.
- Letter-sized envelopes, cards, flats, and parcels that weigh 13 ounces or less

## What is First-Class, Presorted mail?

Most "bulk mail" is mailed as first class mail and at standard USPS postage rates, but in order to receive any discounted rates, we must prepare mail to meet certain USPS criteria to qualify for the lowest discount available.

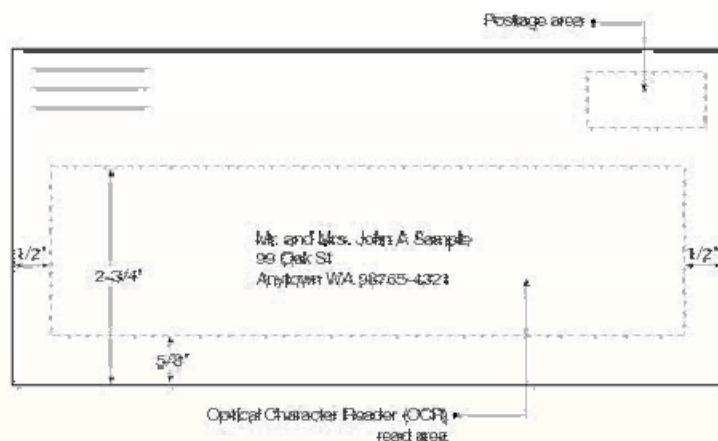
Postage discounts:

Maximum price per piece .45

Lowest discount per piece .09

Minimum Requirements:

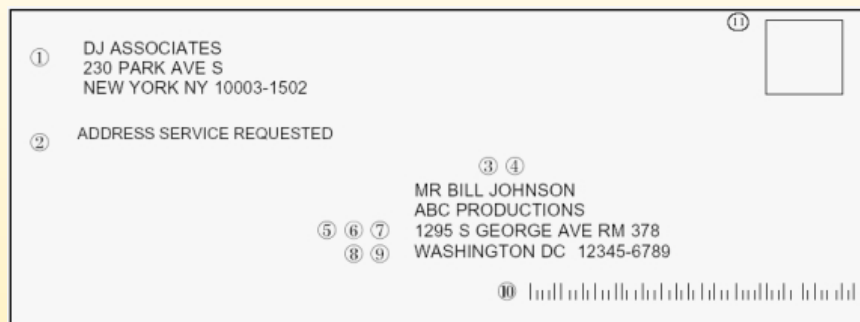
- 300 pcs. for first-class
- 200 for standard non-profit
- identical weight
- First class may contain personal data
- Non-profit has to be generic in nature



## Preparing Mail

- All mail pieces must have an SMC return address with your department name on it.
- White or light pastel colors of paper are best for readability. Use black ink and either a 10 or 12 point font.

## Elements of a Mail Piece



### Elements of the Mail piece (Identified in the Diagram Above):

1. Always use a return address - if the letter is undeliverable, it can be returned.
2. Endorsements are placed above and to the left of the delivery address (2 lines below return address). This is optional for non-profit mail.
3. Name and/or "Attention:" line. Print or type delivery address clearly in center of envelope (Use 10, 12, 14 pts for best readability).
4. First and foremost, the endorsement should be clear and legible:
  - Use all caps, spaces between words, no punctuation, and left justify the margin.
  - The color contrast between the endorsement and the mail piece background must be kept at a reasonable degree. A brilliant colored background or reverse printing is not permitted for automation discounts. Pieces prepared in this manner will require slower, manual processing.
5. Always use applicable directional in address (e.g., "N" for north and "S" for south).
6. Always use applicable abbreviated locators in address (e.g., APT, ST, AVE).
7. Always include applicable RM (Room), FL (Floor), STE (Suite), or APT (Apartment) # on same line as (and after) street address (preferred), or on the line above the street address.
8. Use two letter state abbreviations in address block.
9. Use a ZIP+4® ZIP Code™ (if known) on last line following city and state. Otherwise, use the ZIP Code.
10. This is the barcode area; if you do not have a program that calculates and prints the correct barcode, then *leave this area blank*.
11. Postage is placed in upper right corner.

If you have any questions, please contact the mailroom at extension 4437.





## WHO WE ARE

**Fredrick (Rick)** came to SMC in 1998 after a 24 year career in the mail services department at USC.

**Rudy** joined SMC in 1999 with over 10 years of work experience in mail services.

**Roberto** has been a member of the SMC family since 1987

## OUR EQUIPMENT

### Bulk Mailer Software

- Qualify mailings for discounts
- Improves Deliverability
- Reduces returned mail
- Cleans mailing lists from wrong addresses
- CASS certified for address correction

### Address Printer

- Eliminates the cost of labels
- Minimize labor (300 envelopes/min.)
- Improves appearance/readability
- Prints bar codes needed for USPS
- Prints on postcards, envelopes, envelopes, and flats

### Folder Inserter & Tabber

- Folder Inserter—Collates, folds, inserts and seals up to ten inserts in a #9/#10 envelope at a peak of up to 4,000 envelopes per hour
- Tabber—applies one, two or three items in a single pass- with throughput speeds up to 20,000 (HT20) tabs per hour
- Tabs, labels or affixes stamps



## MAILROOM SERVICES

The Purpose of the Mail Room department at SMC is to provide all academic and administrative departments with cost effective and efficient mailing and shipping solutions.

### Some of the services provided include:

- All incoming and outgoing mail services
- Bulk Mail
- Collating, Inserting, Folding, tabbing and sealing of envelopes
- Mail list Clean-up for Address/Move correction

### Incoming Mail

- Located in Liberal Arts 102
- All inbound mail is processed everyday; including U.S., Inter-departmental, and offsite mail.
- Letters, postcards, books, boxes, magazines, flyers, advertisements, are received and handled everyday.
- Combination lock boxes for faculty

### Outgoing Mail

- Outbound mail involves preparation, metering, presorting and delivering mail to U.S. Post Office, satellite sites and SMM Unified.
- We handle Personal mail
- Express
- Certified
- First class
- Design, elements, address placement and size of a mail piece.
- Presort non-profit.

Phone (310) 434-4437

Email: [dept\\_mailroom@smc.edu](mailto:dept_mailroom@smc.edu)



# Frequently Asked Questions

## Where is the Purchasing Department Located?

Purchasing is located at: 2714 Pico Blvd., Room 329, Santa Monica, CA 90405.

## How do I place an order for my department?

For specific items, you will need an approved purchase requisition.

For blanket purchase orders, if you are an authorized buyer, you may place your order directly with the supplier, not to exceed the total amount of the order.

## Who is authorized to sign a vendor contract on behalf of the District?

Only those District Officials designated by The Board of Trustees are authorized to sign legally binding contracts on behalf of the District. In general, no staff or faculty member or dean has the authority to obligate the District in any contractual manner or sign an agreement.

## When is Formal bidding required?

For equipment, goods, materials and services, the formal bid threshold as of January 1, 2013 is \$83,400.

For public works, the formal bid threshold is \$15,000.00.

## How do I determine if the District has a contract for a specific commodity?

Please contact your buyer regarding buying contracts. You may also visit our website at <http://www.smc.edu/purchasing>

How do I determine which buyer to contact regarding a particular commodity?

Visit the Purchasing Department's Staff Directory. Each buyer is listed and you can click on their Commodity List to see their assigned information.

## How do I determine if a requisition has been converted to a purchase order?

You may contact your commodity buyer. For those of you who have "PeopleSoft Budget Inquiry", the encumbrance will reflect on the Budget Inquiry Screen.

## What is the procedure for ordering business cards?

You should prepare a requisition, attach a sample and forward your requisition through the approval process. All business cards must be purchased from the Purchasing identified supplier.

For more FAQ's visit our website at [www.smc.edu/purchasing](http://www.smc.edu/purchasing).

## PURCHASING DEPARTMENT

1900 PICO BOULEVARD  
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