

**MESSIAH COLLEGE**  
**PURCHASING DEPARTMENT**

**PURCHASING POLICIES & PROCEDURES MANUAL**

July 1, 2008

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**I. MISSION STATEMENT** 2/20/08

The Department of Purchasing is Messiah College’s centralized source for procuring materials, supplies, equipment and services required for the operation of the college and its various departments. Purchasing exists to provide “best value” products and services. Purchasing is charged with direct purchasing through an authorized purchase order and the tracking of the order to the point of approving invoices for payment. In addition, Purchasing provides assistance with Requests for Proposals (RFP’s), and preferred provider sources of products/services. Purchasing is also charged with oversight of the institutional travel policies and procedures.

**II. STATEMENT ON POLICIES & PROCEDURES**

1. Purpose

- 1.1 To communicate the Authority, Techniques, Functions, Policies, and Procedures of the Messiah College Department of Purchasing.
- 1.2 These policies and procedures have been prepared to provide information and direction to the various departments of the College. Its primary purpose is to communicate policies and give guidance to personnel assigned to the purchasing function, others with delegated purchasing authority, and administrative department heads authorized to approve requisitions to purchase.
- 1.3 Policies and procedures will be revised and supplemented, as required, to meet new needs and conditions. An important part of this updating process depends on the constructive comments, information and suggestions received from you, the users. Your comments are encouraged.

## 2. Responsibility

- 2.1 It is the responsibility of all who have been delegated the authority to commit College funds through the purchasing function to adhere to the College's policies contained in this manual.

## 3. Definitions

- 3.1 Authority: Identification and recognition of the positions and the agency which have responsibility and accountability for the procurement of supplies, equipment, and services necessary for the operation of the College.
- 3.2 Methods: Central Purchasing utilizes several methods of procurement.
- 3.3 Functions: The role and responsibilities of the Department of Purchasing at Messiah College.
- 3.4 Policies: Decisions made by Management for the purpose of giving information and direction. Policies establish basic and standardized instructions and regulations, and determine the major values upon which the Department of Purchasing must operate.
- 3.5 Procedures: Procedures are the prescribed means of accomplishing policy. Their intent is to provide College personnel with the guidelines to ensure uniformity, compliance and control of all policy-related activities.

## **III. AUTHORITY TO PURCHASE**

### 1. Purpose

- 1.1 Identification and recognition of the positions and the agency which have responsibility and accountability for the procurement of materials, supplies, equipment, and services necessary for the operation of the College.

### 2. Authority to Purchase

- 2.1 Only those persons delegated by the President, Provost, and the Vice Presidents, are authorized to commit the College for the procurement of materials, supplies, equipment and services.
- 2.2 The Department of Purchasing is the principal agency authorized to make commitments for materials, supplies, equipment, and service necessary for the operation of the College.
- 2.3 The Director of Purchasing has the responsibility for the procurement of all goods and services, the processing and sale of goods and services, and to either provide the services for such procurement and processing or give

functional directions to others delegated the authority to perform such services.

- 2.4 Limited delegation of purchasing authority has been given to several areas of the College because of their unique purchasing requirements. These are:

Human Resources: Benefits Programs  
Office of Dining Services (Food)  
Murray Library (Acquisitions)  
College Bookstore (Retail)

**Note:** The above areas, though not channeled thru purchasing, must still adhere to the policies of the purchasing department and to the “**Contract authorization Policy**”, **December 12, 2007**. (see **Addendum A**).

### 3. Authorization Levels

- 3.1 There are levels of authority and “signature authorizations” that must be adhered to at Messiah College. A purchase order is a “contract” between Messiah College and a company or individual. Through action of the Board of Trustees, only the President, Provost, and the Vice Presidents are authorized to execute contracts which legally obligate Messiah College. The President, Provost and the Vice Presidents may delegate such authority.
- 3.2 All contracts over the amount of \$25,000 must be signed by both the appropriate Vice President or Provost and the person to whom s/he has delegated authority. A contract requiring a financial expenditure of \$100,000 or more, or obligating the College to performance over more than 3 years, shall be executed only upon the prior written approval of the President.
- 3.3 With the development of an electronic requisition, a tiered “approval process” was designed to move a requisition through authorized personnel till the highest appropriate level has been satisfied at which time the requisition will be routed to Purchasing. Approval queue levels and limits are established in discussion between the appropriate Vice President and the Controller in accordance to the Contract Authorization Policy.
- 3.4 To process a requisition through purchasing, the requisition must bear the requisitioner’s name. If the requisitioner is the budget director, then only one signature or electronic approval is necessary up to the level determined by the Vice President or Provost of the division for that budget director.
- 3.5 Capital Expenditures must be specifically approved through the capital budget process. Once approved, a requisition must follow the standard authorization levels illustrated above and designated by the appropriate Vice President or Provost of the division.

- 3.6 Authority and authorization level policy applies to requisitions, check requests, direct invoicing, capital expenditures and contracts.
- 3.7 No individual except as indicate above, has the authority to obligate Messiah College in any way for any indebtedness. Any other commitments are considered as unauthorized and the individual may encounter a personal obligation to the supplier. Questions concerning any specific authority or delegation should be referred to the Director of Purchasing.

#### IV. METHODS OF PROCUREMENT

1. Several methods of procurement are available to the College. A “**Purchasing Method – Decision Matrix**” (see **Addendum B**) has been designed to assist employees in determining the appropriate authorized buying method for purchasing products and services. The matrix is indexed by commodity and allowable purchasing methods. There are a number of commodity categories which are permitted using the Visa Purchasing Card with a maximum single item limit before the request must be placed on a purchase order. Additionally there are categories that have been approved to use a check request or direct invoicing. While these last two options are available for the noted items, institutional guidelines must be adhered to such as authorization levels and dollar threshold which determine price checking or bid requirements.
2. The methods available are:
  - a. Standard Purchase Order (see **Section IV. 2.1**).
    1. Paper Requisition
    2. Electronic Requisition
  - b. Purchasing Card (see **Section IV. 2.2**).
    1. At point of sale/ use
    2. Website purchase
  - c. Blanket Purchase Order (see **Section IV. 2.3**).
  - d. Office Supplies – Sole Supplier (see **Section IV. 2.4**).
  - e. Check Requests (see **Section IV. 2.5**).
  - f. Direct Invoicing (see **Section IV. 2.6**).
  - g. Emergency Purchase Order’s (see **Section IV. 2. 7**).

##### 2.1. Standard Purchase Order

The standard document issued by the Messiah College Purchasing Department to a vendor indicates a request to purchase goods and/ or services. To obtain a Purchase Order there are two methods of requisition:

1. Paper Requisition (see **Section VII. 2.2.1**).
2. Electronic Requisition (see **Section VII. 2.2.4**).

## 2.2 Purchasing Card

Messiah College has a “purchasing card program” designed to allow for the direct procurement of low-value purchases by the end-user through the use of a credit card. Credit cards eliminate the need for requisitions for small dollar amount purchases, reduce paperwork, simplify the payment process and improve vendor negotiations. They provide greater flexibility in ordering and provide a convenient mechanism for managing expenses for those that travel. Those requisitioners who have been issued credit card(s) may initiate transactions in person, by telephone or via the internet within the limits of the individual card transaction limits adhering to the policies stated in the Visa Purchasing Card Manual and the Institutional Purchasing Policy.

## 2.3 Blanket Purchase Order

A “Blanket Purchase Order” is similar to a Standard Purchase order in that its’ authority comes from the Purchasing Department, however a “Blanket Purchase Order” may be issued for frequent purchases or emergency needs from a designated vendor. For both the benefit of the college and the vendor one order may cover the purchases for a specific period of time or till a maximum dollar value has been reached.

## 2.4. Office Supplies – Sole Supplier

Messiah College and The Phillips Group have developed a partnership for the acquisition of office supplies. By consolidating our office supply purchases with one primary company, the department of purchasing can significantly save your department time in searching for office supply products, provide savings through discounted prices, while providing next business day desktop delivery.

Purchases are made over The Phillips Group website called “[EZ Order](#)”. A login and password are provided individually to authorized representatives in a department. (see **Addendum C**).

## 2.5 Check Requests

A “check request” is submitted for payment of goods and/or services that do not go through purchasing because the nature of the item or service permits the use of a check request. Refer to the “**Purchasing Method – Decision Matrix**”, **Addendum B** or call the Purchasing Department for clarification.

2.6. Direct Invoicing

A “direct invoice” may be an acceptable method of purchasing for categories that have received permission by institutional policy or it may occur when a purchase order has not been obtained and the vendor directly invoices the department. This method is limited in its use. Refer to the “**Purchasing Method –Decision Matrix**”, **Addendum B** or call the Purchasing Department for clarification.

2.7 Emergency Purchase Order’s

True emergencies do exist; however, they are defined as circumstances or situations beyond anyone’s control such as major facility failures, damages due to disasters, or purchases necessary to address immediate public health, safety and security issues. In these instances, the Purchasing Department will expedite your order as quickly as possible. Once you have verbally received the emergency order number, you may contact the supplier to proceed.

## V. FUNCTIONS

1. Purpose

- 1.1 To identify the role and responsibilities of the Department of Purchasing for Messiah College.

2. Functions

- 2.1 The chief function of the Purchasing Department is to give assistance to all departments of the College in the procurement of supplies, equipment, and services.
- 2.2 To establish contacts and maintain effective and professional relationships with suppliers, actual and potential, for supplies, equipment, and services.
- 2.3 To act as a center of information on sources of supply, cost, availability, and delivery of supplies, equipment, and services.
- 2.4 To provide and maintain catalogs, arrange demonstrations, obtain samples, and consult with appropriate personnel concerning their requirements.
- 2.5 To develop specifications, evaluate the need, and determine the most appropriate purchasing method for the proposed purchase.
- 2.6 To establish standards of equipment and materials in common use throughout the College in order to provide greater purchasing power through volume buying.

- 2.7 To effect savings and economy of the College resources wherever possible.
- 2.8 To establish expediting and follow up procedures to assure prompt delivery of needed materials and services.
- 2.9 To avoid duplication of equipment by careful review of requests.
- 2.10 To maintain and enhance the College's image by their personal conduct and methods of conducting business.
- 2.11 Budget Control:
  - a. Prevent unauthorized purchases.
  - b. When a NSF condition is detected by Banner, communication with the originating department will be made to consider options. Authority to override NSF rests solely with the Controller.
- 2.12 Prevent payment for goods not received or received in unsatisfactory condition.
- 2.13 Prevent double payments by:
  - a. Maintaining accurate records of goods received.
  - b. Maintaining accurate records of invoices paid.
- 2.14 Explore and use possible advantages of inter-institutional consortia and other cooperative purchasing programs.
- 2.15 Arrange for control and disposal of surplus equipment and supplies.
- 2.16 Coordinate interior design services in conjunction with the appropriate senior administrator.
- 2.17 Assist in preparing budget estimates for equipment, supplies, furnishings, etc. Define and categorize supplies vs. equipment for uniformity in the budgeting process.
- 2.18 Provide routine training workshops to cover the basic purchasing process which includes identifying a need to purchase products or services, communicating with potential vendors, placing an order and/or writing a contract, handling discrepancies and paying vendors. Discuss purchasing methods and initiatives such as Approval Authorization, Quotes, Bids and RFP's, requisitions, purchase orders, Banner Self-Service Requisition entry and approvals as well as the responsibility of the department purchaser to follow policies and procedures and how to best utilize the support services offered by the Purchasing Department.

## VI. PURCHASING POLICES

### 1. Purpose

- 1.1 The department of purchasing is Messiah's centralized source for materials, supplies, equipment and services (such as office and classroom supplies, furniture, maintaining source catalogs and vendor relationships) required for the operation of the college and its various departments. Purchasing exists to provide "best value" products and services that are in compliance with Messiah College's Purchasing Policies and Procedures.
- 1.2 The department of purchasing provides direct purchasing services such as RFP and bid proposal development, consolidated purchases, price negotiation and product quality standards.

### 2. Policies (General)

- 2.1. NO ONE should procure goods and services until a college purchase order has been obtained. To make a purchase without a purchase order does not legally bind the College to the transaction in any way. The individual who is involved in such a transaction incurs a personal liability for which only he or she is responsible. One who implies by his/her actions that he/she is a purchasing agent should be prepared to accept full responsibility for the value of the goods and services.
- 2.2 Final authority for all purchases rests with the President, Provost, Vice President for Finance, the Director of Purchasing, and other authorized personnel in the Purchasing Department.
- 2.3 The Director of Purchasing has full authority to question the quality and kind of materials requisitioned to ensure that the best interest of the College is served.
- 2.4 All decisions to procure goods and services must comply with the "**Purchasing Method – Decision Matrix**". (see **Addendum B**). Accounts Payable will intercept all direct invoices and check requests that do not comply. **Note: This may cause the vendor to be banned from doing business with the College if the practice continues with the vendor's approval, and result in employee sanctions, including but not limited to the discontinuance of any purchasing authority.**
- 2.5 Salesmen will be received regularly in the Purchasing Department. When it is necessary for departments to interview salesmen regarding special details of their products, direct contact can be made with the vendor by the individual concerned. The Purchasing Department should be advised of vendors' visits to the campus whenever possible.

- 2.6 All things being equal, (quality, service, price, and delivery) the preference of Messiah College favors making purchases locally.
- 2.7 If the vendor is an employee or a friend of the College or has a pre-existing relationship with the College, the independent bidding process shall be used regardless of the value of such goods and services. (see “**Conflict of Interest Statement**” in this **Section VI. 7**).
- 2.8 Vendor Selection and Changes: Potential vendors are selected by their ability to serve the needs of the College in the most economical and efficient manner possible on a continuing basis. The Purchasing Department may purchase items listed on a requisition from multiple sources to take advantage of special discounts, superior service or reduced delivery times. The standard of quality will not be changed without consultation with the originator of the request.
- 2.9. Departmental Suggestions of Vendors for Unusual Items: Departments are encouraged to provide complete descriptions of the products and to suggest sources of supply with complete address, particularly for unusual items. This will assist the Purchasing Department to find better pricing for the same item(s). The Purchasing Department will follow a department's recommendation as much as possible. The Purchasing Department must have a complete description of the products in order to solicit pricing from additional vendors.
- 2.10 Consolidation of Purchases: Keeping in mind delivery schedules, purchases of similar items or items from common sources shall be consolidated for purchasing whenever possible in order to gain maximum discounts and best vendor service.
- 2.11 Confidential Prices: It is imperative that good relationships be established and maintained between the College and its vendors. Because of the institutional discounts given us, prices are considered confidential and are not to be released to vendors or other personnel except through the Purchasing Department.
- 2.12 Purchasing personnel will work to establish and encourage punctual delivery of specified goods and services in correct quantities.
- 2.13 Purchasing personnel will negotiate the return of rejected equipment or supplies to suppliers.
- 2.14 Purchasing personnel will inform ordering departments whenever the quantity or specifications of materials ordered are inconsistent with sound purchasing practices or market conditions.
- 2.15 Purchases of goods, contracted services and lease of equipment are to be made only through the Department of Purchasing and authorized by a formal Purchase Order issued by the Purchasing Department.

- 2.16 “In-Advance” Purchase Order numbers are strictly prohibited. Only a true “emergency” defined as circumstances or situations beyond anyone’s control such as major facility failures, damages due to disasters, or purchases necessary to address immediate public health, safety and security issues. In these instances, the Purchasing Department will expedite your order as quickly as possible. Once you have verbally received the emergency order number, you may contact the supplier to proceed.
- 2.17 Never “Add-on” to an existing open purchase order without submitting a “Change Order”.
- 2.18 Never place an order with a vendor using a closed PO number.
- 2.19 The College has developed policies and procedures on specific goods and services which must be processed through the department of purchasing. They are:
- a. Office Supplies  
All “office supplies” are to be purchased through our on-line office supplier, “**The Phillips Group**”. (see **Addendum C**).
  - b. Furniture  
All furniture for individual offices, general and public meeting areas, small renovations, and large construction projects must be processed through the department of purchasing.
  - c. Capital Expenditures  
Capital Expenditures are required to be processed through the Purchasing Department on a Purchase Order as opposed to using a Visa Purchasing card, direct invoicing or check request.
- 2.20 The following transactions are not within the purchasing function and will not be handled by the Purchasing Department with the exception of a vendor which may require an official College Purchase Order.
- a. Journal transfers.
  - b. Library materials, being books, periodicals, documents, and other printed and published materials which are suitable for inclusion in the Library.
  - c. Dining Service - Food only
  - d. Items for resale in the College Bookstore such as school supplies, text books, paperbacks, etc.
  - e. Contracted construction materials; this is the responsibility of the contractor.
  - f. Services involving professional expert advice, such as medical, legal, architects, engineers, accountants, etc.
  - g. Classified advertisements of any nature
  - h. Public Utilities

- i. Insurance contracts
- j. Conference/ seminar fees
- k. Professional training
- l. Subscriptions

### 3. Quotations and Bidding Policy

- 3.1 The Purchasing Department has the ultimate responsibility for obtaining quotations, verbal or written, depending on the dollar amount. In instances where specialized expertise (i.e. specialized equipment such as in ITS, engineering, the various sciences, etc.), purchasing will rely on the individual department to provide specific ordering information and drafting of specifications as the department is better equipped in this circumstances to evaluate vendors and their products.
- 3.2 All purchases of either a single item or collectively on a single purchase order must solicit either a quotation or bid under the following minimum guidelines: (see **Addendum D.**, where a “**Purchase Order Flow Chart**” illustration provides decision point and the process from order to deliver of the product or services).
- a. Purchases < \$1000 requires routine price checking
  - b. Purchases between \$1,000 and \$5,000 requires a minimum of (2) two verbal quotations. The names of the companies and the quoting individual must be noted on the requisition. No Purchase order will be issued until reviewed by Purchasing.
  - c. Purchases between \$5,000 and \$25,000 require a minimum of (3) three written quotations. The names of the companies, the quoting individual and the quotes must be noted on the requisition and documentation sent to purchasing. No Purchase Order will be issued until reviewed by Purchasing.
  - d. Purchases > \$25,000.00 require a minimum of (3) three written bids. The formal bid process will be used before a contractual agreement is made. All documentation of the bid process/ participants must be submitted with the requisition and reviewed by the Director of Purchasing before any commitment is made.
- 3.3 When a bid is required, the requisitioning department is responsible for specifying the requirements such as price, quantity, technical specifications, concise scope of work, quality expectations, delivery date required, supplier’s terms, insurance requirement (if applicable), additional rates and fees (permits, certifications), etc.. It is also the general policy to place the order with the vendor submitting the lowest and best quotation/ bid.
- 3.4 The purchasing department will assist departments in locating potential suppliers and obtaining pricing and product availability information for any materials or services they require.

- 3.5 **Exemption to Bid Requirements:**  
If competition is determined to not be feasible due to the sole source nature of a product/ service or supplier, for an order that exceeds \$5,000, a completed sole source justification form is required by the purchasing department prior to the commitment being made. (see **Addendum E** for the **“Sole Source Justification Form”**). The form is to be submitted to purchasing with the requisition.
- 3.6 “Single source” is defined as immediate past experience, delivery capability, proprietary, compatibility with existing equipment or supplies, specific design or performance features essential in maintaining continuity, availability of parts or maintenance, or for lack of time in true “emergency” situations.
- 3.7 All departments are encouraged to seek product or specification information and cost estimates for budgetary purposes from the Purchasing Department.

#### 4. Preferred Vendors Policy

- 4.1 A “preferred vendor” is one with whom the College has negotiated an agreement which could include price discounts, delivery arrangements, customer service requirements, etc. The “Preferred Vendor” program formalizes the relationship with vendors who are selected based on procurement volume and their strategic and economic benefit to the College. These will be College-wide agreements and the same discounted price and service levels will be available to all College Departments.
- 4.2 A “preferred vendor” may also be vendor who is part of a purchasing consortium which provides national and/or regional contracts. These consortium vendors offer deeper discounts because of the combined purchasing volumes of the colleges and universities affiliated with the consortium.
- 4.3 A Preferred Vendor:
- a. Completes a formalized, competitive selection process directed by the Purchasing Department or by a consortium association and documented for tracking renewal and re-negotiations.
  - b. Generally accepts the College’s Purchasing Card
  - c. Signs a contract that details contractual conditions of sale and guarantees the College pricing and supply for a specified period of time.
- 4.4 Purchasing strongly recommends the use of our preferred vendors and will publicize the availability and details of these agreements on the Purchasing Website. Below are a few of our current local “Preferred Vendors”. A much larger list of vendors may be viewed by going to the **“Preferred Vendor Cross Reference”** (see **Addendum F**) and then calling the

Purchasing Department for additional information. This list will change as new relationships are reviewed and established.

- Appliances – Billows’ Appliances (Purchasing)
- Bottled water –Crystal Spring Water (Purchasing)
- Cellular Phones – AT&T (ITS)
- Computers – (Contact ITS)
- Copiers – Toshiba/ Engle Business Equipment (College Press)
- Electrical Supply – Dauphin Associates (Facilities)
- Furniture of all types – Various vendors (Purchasing)
- Maintenance – WW Grainger (Facilities or Purchasing)
- Media Equipment – Visual Sound (Media Center)
- Medical Supplies – Medco Supply (Purchasing)
- Office Supplies – The Phillips Group (Purchasing)
- Packaging/ Shipping – UPS
- Paint – Duron, MAB, Sherwin Williams (Facilities)
- Printers – (Contact ITS)
- Rental Cars – Enterprise (Local); Other contracts (Purchasing)
- Science Supplies/ Equipment – VWR, Thermo Fisher Scientific
- Training Supplies – Moore Medical, Seneca Medical (Purchasing)
- Travel Agency – Travel Time Travel Agency, MTS (Purchasing)

## 5. Furniture Ordering and Standardization Policy

### 5.1 Purpose

- a. To develop specifications, evaluate need, and determine the most appropriate purchasing method for the proposed purchase.
- b. To ensure maximum purchasing power by obtaining furniture through contract vendors with pre-negotiated discounts.
- c. To ensure consistent value, durability, cost effectiveness, warranty and serviceability.
- d. To assist with budgeting projects and future purchases. Budgetary information and furniture lead times will be available for project planning and scheduling.
- e. To allow personal choices within a selected range of furniture items. These choices may include a variety of models, sizes, and finish selections.
- f. To document furniture purchases for standardization within individual buildings, future reference, warranty requirements, replacement, evaluation of durability.

## 5.2 Policy

- 5.2.1 The Purchasing Department manages office furniture and furnishings on campus, and will utilize current inventory or outside vendor relationships for best quality and pricing. All furniture requests for individual offices, general and public meeting areas, small renovations, residential life and large construction projects must be processed through the Purchasing Department on a College Purchase Order utilizing the “**Furniture Request**” form (see **Addendum G**).
- 5.2.2 Furniture standards serve as guidelines to maintain a consistent approach to cost, quality, design, and health and safety issues. Many of our buildings have a large number of components from a limited number of manufacturers, models and colors. This allows our furniture assets to more easily be identified and inventoried resulting in reutilization of our assets by extending our furniture life.
- 5.2.3 Standardizing purchasing with fewer companies, manufacturers and models will result in better contract pricing, terms, delivery and warranty service.
- 5.2.4 Standardization, while allowing for variations based on functions performed in the space, also helps our facility staff, designers, architects and employees understand Messiah’s space planning strategies.
- 5.2.5 Interior design services are coordinated through the purchasing office. Collaboration with Facilities Project Management may be necessary to ensure that space is properly utilized, quality standards are maintained, and regulations concerning material flammability, accessibility for the handicapped and other codes are adhered to.
- 5.2.6 Furniture purchase requests that require space modifications must be submitted as part of the Capital Budget Process for review and approval prior to purchase. The Purchasing Department will contact Facilities Project Management to assure proper coordination of the lighting, electrical/data/phone wiring, heating, and air-conditioning and ventilation installation.
- 5.2.7 Design assistance and project management assistance for large or unusual projects should be budgeted and be paid for as part of the furniture purchase. Consultant referrals will be obtained through the Purchasing Office.
- 5.2.8 NO ONE should purchase furniture until a college purchase order has been obtained. To make a purchase without a purchase order does not legally bind the College to the transaction in any way. The

individual who is involved in such a transaction incurs a personal liability for which only he or she is responsible. One who implies by his/her actions that he/she is a purchasing agent should be prepared to accept full responsibility for the value of the goods and services.

- 5.2.9 The use of the Visa Purchasing Card is prohibited for the procurement of furniture.
- 5.2.10 Furniture purchases are prohibited through the College's office supply vendor regardless of cost.
- 5.2.11 The Purchasing Department maintains a list of furniture suppliers. Due to the constraints placed upon the College's Receiving Department, we recommend using local suppliers who can arrange inside delivery and installation. This applies to everyday items (i.e. chairs, desks, file cabinets) as well as panel and modular systems.
- 5.2.12 Any moves of furniture must be coordinated with Campus Events. (see **Addendum H** for a "**Request to Move Furniture Form**"). Purchasing has documented furniture across campus for location, model, description, original price. Campus Events maintains this information as changes are made and new furniture is purchased.
- 5.2.13 A "**Furniture Order Work Flow Chart**" has been developed to provide the step-by-step process. (see **Addendum I**).
- 5.2.14 All Exceptions will be submitted to the Purchasing Office for review and approval prior to purchasing the item. When appropriate, the Purchasing Office will forward exception requests to the Provost or respective Vice President for approval. Exception requests forwarded to senior administrators will include the requesting department manager's rationale for the exception and the Purchasing Office's recommendation for approval or denial.

## 6. Surplus Property Disposal

- 6.1 The policy for the disposal of surplus property is to provide a clear and concise guideline for the distribution and disposal of all Messiah College surplus property. (see **Addendum J** for "**Surplus Property Disposal Work Flow**").
- 6.2 The Director of Purchasing has the authority and responsibility to dispose of surplus material and equipment on behalf of the College.
- 6.3 Items which are no longer needed by a department are considered "surplus" materials. These items may, however, be useful to other members of the College campus.

- 6.4 The Director of Purchasing is authorized to arrange for disposal of surplus material and equipment by internal transfer, outside sale or outright contribution. When new furniture or equipment is purchased and there are un-needed items to be disposed, the Purchasing Department should be the first point of contact to have it removed. (see **Addendum K “Surplus Property Disposal Request”** form). Purchasing working in collaboration with Campus Events will provide for the removal and storage of surplus material.
- 6.5 If it is still usable, it will be stored for use by other departments. Items placed in surplus are not kept for a specific department but are for general campus wide use on a first come, first serve basis. Items from surplus can be given to any department in need. If your department is in need of an item and you do not have funds, you can check with the Purchasing Department and see if the item is available in surplus.
- 6.6 No college property may be removed from the campus for personal use, resale or other unofficial use unless processed through the department of purchasing.
- 6.7 Property that has not been transferred to another department and still has a useful life may be placed in “surplus storage” or it may be sold through bid or advertisement. (see **Section VII. 2.14 “Surplus Property Disposal Procedures”**).
- 6.8 Property sold or donated carries no warranty from the College. The College accepts no liability and all transactions are as is and final with no returns.
- 6.9 Hazardous Material: A department may not declare any materials that have hazardous chemical compounds contained therein. Materials that exhibit the characteristics of ignitability, corrosiveness, reactivity, toxicity or are on any Federal or State hazardous waste lists are considered to be hazardous and are not managed by purchasing. When it is determined that a product which contains hazardous chemical compounds is no longer needed, the item needs to be reported the Environmental Health and Safety department. The EH&S department will determine and document the proper method of disposal.
- 6.10 An item in extremely poor condition should be trashed after the Purchasing Department is notified.
- 6.11 **Exceptions**
- a. ITS manages the record keeping and disposal of IT type equipment. If a computer or piece of equipment that has a serial number is to be eliminated, contact ITS. ITS will document for removal from the Capital

Assets list and contact the Business Office to remove the item(s) from the College Asset list.

- b. The Library periodically has “book sale” days. These are conducted solely by the Library and are exempted from this policy. The library must notify the Business Office of any proceeds obtained through the sale.

7. Potential Employee Conflict of Interest

- 7.1 Federal regulations require Messiah College to have explicit procedures for addressing incidents in which there are allegations of improprieties or conflicts of interest in purchasing. This purchasing policy works in tandem with the **Messiah College Policy and Procedure Manual: Human Resources Employment Policy** 1.12. *“Potential Employee Conflict of Interest”*.
- 7.2 **Potential Employee Conflict of Interest.** An employee of the College shall be considered to have a conflict of interest if he or she has existing or potential financial or other interests which impair or might reasonably appear to impair the employee's independent judgment in the discharge of duties to the College. The following standards shall be followed in business or contractual transactions of the College in which employees are personally involved:
  - 7.3 There shall be full disclosure by the employee to his or her supervisor of potential conflicts of interest. It shall be the responsibility of the employee to report annually financial benefits of material amount (i.e., exceeding \$250) including any free or discounted services received by the employee as a result of his or her employment by the College. (see the **Conflict of Interest Disclosure Form**, see **Addendum L**).
  - 7.4 No compensation shall be paid to College personnel or consultants on a commission basis for services in fund raising, student recruitment, or similar activities.
  - 7.5 Personnel of the College who carry out personal cultivation of prospects or who are involved in the purchase of goods and services shall not receive material financial benefit from such activities. Fees received as executor in the administration of estates, personal gifts of goods, gift-in-kind, real estate, or cash received as a bequest or during a prospect's lifetime shall be returned as gifts to the College. This restriction shall not apply if such fees or gifts are received by a College employee from the estate of a person related to him/her by blood or marriage or from a relative during the relative's lifetime. Minor personal gifts or special consideration with a retail value of less than \$250 may be accepted in consultation with direct superiors if acceptance is determined by them not to be detrimental to the best interests of the College. At no time shall an employee of the College advance in his or her professional relationships a personal interest in conflict with the work of the institution.

- 7.6 Failure to abide by the conflict of interest policy shall be cause for disciplinary action which may include termination of employment. The decision of the President as to alleged conflicts of interest shall be final.

## VII. PURCHASING PROCEDURES

### 1. Purpose

Procedures are the prescribed means of accomplishing policy. Their intent is to provide College personnel with the guidelines to ensure uniformity, compliance and control of all policy-related activities.

### 2. Procedures

A purchase order properly executed by the Purchasing Department is the principal method of committing the College for the purchase of supplies, equipment, and services.

- 2.1 Authority to Submit Requisitions: Any faculty or staff member may initiate a requisition for the purchase of supplies, equipment, or services. The department chairperson or appropriate budget administrator **MUST** sign or authorize their approval and forward the requisition to the Purchasing Department. Electronic requisitions will be routed through a hierarchical approval queue set up by the Business Office at the request of the requisitioner's department chairperson, director, or other administrator authorized to do so.

**Note: See "Authority to Purchase" in Section III. 3 for guidance on signature levels.**

- 2.2 The Requisition Form – There are two forms of requisition forms in use currently. They are:

- a. Paper (see **VII. Section 2.2.1**)
- b. Electronic (E-mail) (see **VII. Section 2.2.4**)
- c. Blanket Order Requisition (see **VII. Section 2.2.11**)

#### 2.2.1 **Paper Requisition Form**

The originator of the purchase requisition will fill out the form as completely as possible by providing the following basic information: (see **Addendum M** for an example of the "**Paper Requisition**").

- a. The complete vendor name, address, phone number, and name of the contact person of the vendor, if known.
- b. The date originated.
- c. Date required. (Do not use ASAP.)
- d. The individual to whom the material is to be delivered to.

- Include building and room number.
- e. The full account number. (Organization and Account Codes.)
- f. The exact quantity using units such as pounds, dozen, carton, gallons, etc.
- g. A complete description, including any catalog numbers.
- h. The unit and total price.
- i. A signature of the Department Head or Administrative officer is required to indicate the proposed purchase is approved.

2.2.2.1 It is essential to provide the information listed above. Omission of any item or an incomplete description may result in more work for the College, a loss of potential savings, a delay in ordering and delivery.

2.2.2.2 When the above requirements have been met, remove the yellow copy and send the original to the Purchasing Department.

### 2.2.3 **Electronic Requisition Form – (E-mail)**

2.2.3.1 An e-mail electronic requisition is currently being used by a few departments and will be replaced campus wide by an electronic requisition utilizing Banner Self-Service. This Banner Self-Service Requisition is in the implementation process. Purchasing is currently training individual departments. This is planned for full implementation by Fall 2008.

2.2.3.2 An approval queue was designed to move a requisition through authorized personnel till the highest appropriate level has been satisfied at which time the requisition will be routed to Purchasing. Approval queue levels and limits are established in discussion between the appropriate Vice President and the Controller in accordance to the Contract Authorization Policy.

2.2.3.3 The originator of the electronic requisition will fill out the form as completely as possible by providing the following basic information: (see **Addendum N** for an example of the “**Electronic Form**”).

- a. The complete vendor name, address, phone and/or fax number and the name of the contact person on the vendor if known.
- b. Date Submitted

- c. Date Required (Do not use ASAP).
- d. Pricing Source; i.e. Quote, Catalog, Estimate
- e. Deliver To – The individual to whom the material is to be delivered to. Include building and room number.
- f. Additional Notes – there is a place to add additional notes for either the approver or for purchasing.
- g. Requested By – Enter your name
- h. Date of Request
- i. Additional Routing – additional space for notes on routing
- j. Notify the following after final approval – optional field
- k. This Purchase Order contains Hazardous Materials; Yes or No – check one.
- l. Item # (i.e. Item 1)
- m. Description – enter a complete description including catalog numbers.
- n. Account – enter the full account number (Organization and Account codes)
- o. Quantity – enter the exact quantity using units such as pounds, dozen, carton, gallons, each, etc.
- p. Unit Price- enter the per unit cost (The “Total” field will automatically calculate quantity x unit price.)

2.2.3.4 When this information has been completed, click on the “Submit Request” button. This will route the requisition to the next approver in the queue or to purchasing directly if you are the requisitioner and the final approver.

2.2.3.5 A copy of the electronic requisition may be printed out by the requisitioner.

#### 2.2.4 **SPECIAL NOTES ON ORDERING**

- a. Pre-Planning: The necessity for departments to pre-plan supply and equipment needs cannot be overemphasized. The time required to issue an order and secure delivery, after receipt in the Purchasing Department of a properly prepared and authorized requisition, varies greatly. The work load at any given time within the Purchasing Department is also a factor. Delivery will always depend on suppliers' stock and the problems they have in producing or securing delivery from their suppliers.
- b. Additional Time Required for Equipment Items: Equipment items, whether office equipment, furniture, laboratory equipment or office machines always require more time for planning, purchasing negotiations and for delivery.

Examples of estimate time guidelines: (Call Purchasing)

Furniture -

General Use / Office- 4 - 8 weeks

Classroom - 8 weeks

Custom Built - 8 - 12 weeks

Lab Equipment - 2 - 4 weeks

Office Equipment - 2 - 4 weeks

- c. Budget Account; Available Funds: Budget directors should query Self-Service Banner organizational and account lines to see whether funds are available. Any potential budget problem should be discussed beforehand with the Controller.

## 2.2.5 **Blanket Order Requisition Form**

2.2.5.1 "Blanket Purchase Orders" can be used for consumable goods or services to be released as needed or on a specified schedule reducing inventories. They are general written for a specific period of time and/or a "not to exceed dollar amount" (whichever is reached first), with monthly payment rather than individual invoice remittances. They are best used:

- a. For repetitive, specified services or items, or categories of items from the same vendor over periods of less than a year (generally one month)
- b. For ordering standard materials or maintenance supplies which require numerous shipments.
- c. When it enables the buyer to obtain more favorable pricing through volume commitments.

2.2.5.2 Blanket Purchase Orders generally should **not** be used when:

- a. No benefit will be derived over and above a regular purchase order.
- b. Prices are unknown at ordering time or subject to change later without notice.
- c. Quality of vendor or service is questionable.
- d. Control over college expenditures would be weakened significantly.

- 2.2.5.3 In all cases, "Blanket Purchase Orders" must have the approval of the Director of Purchasing prior to their actual placement. This will allow Purchasing to determine when it is appropriate to issue a blanket purchase order. Note: Blanket Purchase Orders do not encumber a department's budget.
- 2.2.5.4 The originator of the Blanket Purchase Order requisition will fill out the form as completely as possible by providing the following basic information: (see **Addendum O** for an example of the "**Blanket Order Requisition Form**").
- a. The date originated.
  - b. The full account number. (Organization and Account Codes.)
  - c. The Organization Name.
  - d. The period of time to be covered and/ or a "not to exceed total dollar amount".
  - e. Personnel authorized to issue "order releases".
  - f. A signature of the Department Head or administrative officer is required to indicate the proposed blanket purchase order is approved.
- 2.2.5.5 A "Blanket Purchase Order Requisition" will be sent to the Department of Purchasing for a "Blanket Purchase Order" number.
- 2.2.5.6 Purchasing assigns a "Blanket Purchase Order" number and returns a copy of the "Blanket Purchase Order Requisition" to the department with the new "Blanket Purchase Order" number on it for their reference.
- 2.2.5.7 Purchasing will file the "Blanket Purchase Order Requisition" in a section created for "Blanket Purchase Orders
- 2.2.5.8 Purchasing will send out a form letter with the new Blanket Purchase Order number. The letter will contain all the elements of the standard Purchase Order however with new conditions/ instructions. This letter will always bear the signature of the Director of Purchasing. (see **Addendum P** for a sample of a "**Blanket Order Letter**").
- 2.2.5.9 When invoices come in for "Blanket Purchase Order", the department secretary, where the "Blanket Purchase Order" is being used, will verify within the department the receipt, correctness and condition of the items.
- 2.2.5.10 The secretary will then forward the clearly marked "approved" invoice to the Department of Purchasing for final

approval before sending to Accounts Payable. **NOTE: It is highly recommended that the department utilizing the "Blanket Purchase Order" maintain a spreadsheet to track each vendor along with dollars to determine when another "Blanket Purchase Order" is needed.**

- 2.2.5.11 Then the invoice is a final one (Time period reached OR ALL dollars spent) the final invoice will be stamped "COMPLETED" and forwarded to the Purchasing Department.
- 2.2.5.12 The department will send another "Blanket Purchase Order Requisition" to the Department of Purchasing to begin the process again
- 2.2.5.13 A letter will be sent to the Vendor re: Blanket Purchase Orders. The letter will be the official communication of the establishment of each "blanket purchase order" and the renewal of each "Blanket Purchase Order Number."
- 2.2.5.14 The letter will contain the following information along with procedures: (see **Addendum P** for an example of the "Blanket Order Letter").
  - a. Be addressed to a particular vendor determined person in their company.
  - b. State the -period of time to be covered and/or a "not to exceed total dollar amount".
  - c. Request invoice on a particular date (negotiable / 15th of month).
  - d. Request duplicate invoices
  - e. Monthly invoice of all transactions for a given "Blanket Purchase Order."
  - f. Procedures for issuing new "Blanket Purchase Order" numbers
  - g. Cancellation statement.
  - h. "Blanket Purchase Order" number must appear on the invoice.
  - i. Reference #, = activity for the month
- 2.2.5.15 In all cases, "Blanket Purchase Order Letters" must have the approval and signature of the Director of Purchasing prior to their actual placement.

## 2.3 The Purchase Order

- 2.3.1 After the requisition form has been received in the Purchasing Department a purchase order number will be assigned. The information on the requisition form will be processed in the purchasing system and the purchase order processed.
- 2.3.2 The objective in the Purchasing Department is a 24 hour turn-around from requisition to the mailing or faxing of the purchase order. Usually any routine requisition submitted before 11:30 a.m. will be processed and mailed or faxed that same day. Any routine requisitions submitted later than 11:30 a.m. will be processed the next working day.
- 2.3.3 When the requisition has been entered into a purchase order through the Banner Finance System, the originator of the requisition and the person receiving the goods/service will receive an e-mail copy of the purchase order when the system prints the actual purchase order.

2.4 Cancellations or Modifications: Only the Purchasing Department has authority to change a purchase order. Contact the Purchasing Department in writing should such a need arise.

2.5 Expediting: As stated above, once a completed requisition has been received by Purchasing, the Purchasing Department will generate a purchase order and will mail, fax, or e-mail in 24 hours or less during normal business day. Following the placement of the order, the purchasing department runs an aging report to review and if necessary expedite orders on a regular basis. The minimum time to allow for any expediting is two weeks. Beyond that confirmations from vendors are usually sent and we would possibly have an expected shipping date for the order. Any department may request this information and service.

2.6 Emergency Order Number: If it is necessary to obtain an “emergency” purchase order number, contact Purchasing, providing the information necessary to generate an immediate Purchase Order. Note: This is for unusual circumstances defined under policies. This is not an “in-advance” purchase order number.

2.7 Departments needing to return supplies or equipment to suppliers or manufacturers for adjustment or credit must contact purchasing to be processed properly through the Purchasing Department and the Banner Finance System.

2.8 Procedures Requiring Pre-Payment: Sometimes it is necessary to make advance payment for items. In such cases, be sure of the accurate and complete description of the item required, its price, catalog number, and the exact name and address of the supplier. Prepare a "Request for Payment"

form (available from the Business Office) and a requisition with the usual information.

- 2.9 Print or type under the item description the word "Prepayment". Send these two forms to the Purchasing Department. The Purchasing Department will send the Request for Payment to the Accounts Payable. Upon return of the check to the Purchasing Department the purchase order will be sent out.
- .2.10 Receipt of Goods: Central receiving is carried out by the Building & Property Services located at the Lenhart Maintenance Building. A central receiving clerk is designated to carry out the following duties:
- a. Keep receiving copies of purchase orders on file awaiting receipt of goods.
  - b. Check in all deliveries, verifying amounts received against the packing slip.
  - c. Check for damages.
  - d. Enter appropriate information into the computer.
  - e. Route the package to the appropriate department.
- 2.10.1 There are secondary satellite receiving stations set up for specialized materials, equipment, or supplies. They include Eisenhower Campus Center (Bookstore, Dining Services), Engle (Health Suite), Bowmansdale, Kline Hall of Science, Frey Hall, Murray Library (Library/ Media Center), Old Main Mailroom, etc.
- 2.10.2 In nearly all cases it is required that all shippers/ vendors stop at Central Receiving before going anywhere on campus. Examples are printing paper for College Press, Old Main mailroom printed materials, and various items to Dining Services.
- 2.10.3 If for some reason goods are shipped directly to the person ordering instead of to one of the above mentioned receiving stations, it is imperative that the person notify Purchasing immediately so that invoices can be processed promptly and efficiently for payment.
- a. Damaged shipments: Most purchases are made on a "delivered" basis, thus placing responsibility for damage claims on the shipper. When damaged shipments are received, visible or concealed, the department must note on all copies of the delivery receipt any damages observed, and then contact the Purchasing Department. **EXAMINE IMMEDIATELY!** Failure to report damages to Central Receiving within the terms of the freight company may result in payment, by the department, for not only a reorder but unreturnable damaged goods.

- b. Return of materials: Damaged or incorrect items should not be returned to a vendor without prior approval and instructions from the Purchasing Department.
- 2.11 Invoices: All vendors are requested to send invoices, one original and one duplicate, as instructed on the purchase order to the Purchasing Department. Should the vendor send the invoice directly to the department concerned, the invoice should be promptly forwarded to the Purchasing Department for processing. Do not send the invoice directly to Accounts Payable. It is also important that the report of damaged items be reported immediately, enabling the College to hold up the invoice payment.
- 2.12 Payment: The Purchasing Department will check all invoices against data received and will give approval for payment. The Accounts Payable Department will then process the invoice for payment.
- 2.13 Capital Expenditure Procedures
  - 2.13.1 Capital Expenditures are generally defined as expenditures of \$3,000 or greater for equipment, furnishings, buildings, and building repairs. Purchases for these types of items that do not exceed \$3,000 should be budgeted for in the Operating Budget, which is a separate budget process.
  - 2.13.2 Bundled Capital Expenditures represent a group of assets that are intended to work cohesively together or serve a similar purpose. For example:
    - a. A group of microscopes (with similar specifications) for use in a lab. Each microscope costs \$500.00. A single purchased microscope does not meet the Capital threshold of \$3,000, but when ordered in a “Bundle” of 10, the total cost is \$5,000 and would be considered a capital expenditure.
    - b. Office furnishings that make up a room or designated area. Specific example is a conference table and 8 chairs to furnish a conference room
  - 2.13.3 The Business Office has implemented “Capital Expenditure Guidelines” that outline how Capital Expenditures are budgeted. These guidelines are revised, announced, and posted annually on the Business Office channel on MCSquare.
  - 2.13.4 The purpose of these guidelines is to ensure that all parties involved in the named request are informed and approve of the work being requested.

- 2.13.5 Prior to contracting additional work for construction projects or major equipment acquisition, approval must be granted via the Self Service Capital Request Form. The purpose of this form is multiple: (see the Business Office channel on MCSquare for instructions for the form).
- 1) to calculate both current and ongoing costs of a project
  - 2) ensure the compatibility with current plans
  - 3) to gain broad-based support and supervisory approval
  - 4) ensure senior administrative review and approval of the proposed project.
- 2.13.6 Three Capital Planning Teams were created to review all Capital Budget requests. The teams represent every area on campus to ensure fair and equal representation during the budget process. For details of the teams and their leadership, reference the “Capital Team Structure Summary” document located on the Business Office channel on MCSquare.
- 2.13.7 All projects that involve Facilities Maintenance are to be reviewed with Facilities before submission to the respective VP for approval.
- 2.13.8 All projects that involve furniture and or equipment are to be reviewed with Purchasing before submission to the respective VP for approval.
- 2.13.9 Each VP/ Provost is responsible to review all requests and schedule meetings within their own areas to review and prioritize all capital requests.

## 2.14 Furniture Order and Standardization Procedures

- 2.14.1 All furniture requests must be submitted utilizing the “Furniture Request” form (see Addendum H).
- 2.14.2 The originator of the furniture request will fill out the form as completely as possible by providing the following basic information: (Contact Purchasing for assistance as necessary).
- a. Project Title or Department Name
  - b. Type of Space – Check one or more
  - c. Building / External Space – General location

- d. Location – Provide the specific location
- e. Brief Description - Provide a general overview of needs
- f. Contact Information

- 2.14.3 Purchasing will contact the department submitting the order to discuss in greater detail what is required.
- 2.14.4 If the furniture is to be funded as a Capital Expenditure, Purchasing will check with the approved Capital list before proceeding or contact the appropriate VP for authorization.
- 2.14.5 Departments will not contact vendor(s) directly. Purchasing will initially be the sole point of contact with vendors. The initiating department will designate a department contact for purchasing to work with and coordinate vendor consultation.
- 2.14.6 If the location has standard components documented, Purchasing will utilize the same manufacturer and models. Some allowance will be permitted for functional and ergonomic preferences within the line of furniture.
- 2.14.7 Purchasing will contact Facilities Services if the project calls for other space modifications that may arise outside of those not submitted through the Capital Expenditure process.
- 2.14.8 Purchasing will initiate contact with an interior designer if the scope of the project warrants that requirement. In instances of larger scope and funded under the Capital Expenditure process, Purchasing will work in collaboration with Operations and the Facilities Services department.
- 2.14.9 Prior to ordering furniture, Purchasing will review the entire project details and cost with the department chair and receive a final signoff of approval.
- 2.14.10 Purchasing will provide the department with a time line from order to delivery and installation.

2.15 Surplus Property Disposal Procedures

- 2.15.1 Contact the Purchasing Office if the equipment/ furniture are to be disposed of. (see **Addendum J** for “**Surplus Property Disposal Work Flow**”).
- 2.15.2 If the item has potential life remaining, Purchasing will work with Campus Events to store this item(s).

- 2.15.3 Complete a “Surplus Property Disposal Request” form and send the form to Purchasing. (see **Addendum K** for “**Surplus Property Disposal Request**” form).
- 2.15.4 Purchasing will determine that the item doesn’t warrant storage nor disposal. In this event Purchasing will prepare advertising for any potential transfer within the various Campus departments, including Deans and Vice Presidents, to solicit internal interest. Items will be listed on the Purchasing Website as well as advertised through the Intercom or mass-email. One week is allowed for internal responses. If there are no requests internally, Purchasing will advertise this item through commercial surplus auction sites and enter a reverse bid situation to dispose of the equipment.
- 2.15.5 Property with an original cost in excess of \$10,000 must be approved prior to surplus disposal by the Director of Purchasing in conjunction with the Vice President of Finance. Capital assets (with a value of \$3,000 to \$10,000) to be disposed of must be reported to the Vice President of Finance or a delegate for proper removal from our inventory. The condition of surplus items is reported as either "poor" or "obsolete".
- 2.15.6 A bid sheet will be filled out by Purchasing for further processing. At this point a file folder is prepared containing a brief description of the surplus items along with the bid number. All information regarding this transaction will be filed in this folder. A letter will be developed by purchasing to advertise the item(s) for bid and appropriate predetermined companies will be sent this letter.
- 2.15.7 A five (5) day response period is given to recipients of this letter. Businesses and other colleges visiting the public auction (may be listed longer than 5 days) may arrange to view the items in advance as well as view on the auction website lists.
- 2.15.8 Depending on the items, they could also be advertised in the local edition or the Patriot-News Sunday Edition. Letters are faxed or sent to previous bidders who expressed interest in being notified of surplus equipment sales.
- 2.15.9 A copy of the ad is sent to the department along with the bid sheets and envelopes. The department contact person will distribute the bid sheets/envelopes to visiting bidders instructing them that the responses must be received in the Purchasing Office by the date and time noted in the bid envelope.
- 2.15.10 The Purchasing Department is responsible for showing the surplus items to prospect bidders.

- 2.15.11 All bids will be sealed and placed in a locked file. Immediately after the sale concludes, the sealed bids will be opened and the items awarded by the Director of Purchasing. The highest qualified bid received will be successful. If the amount bid on an item is the same, the earliest received bid shall be awarded the item.
  - 2.15.12 The successful bidder(s) will be called and arrangement will be made for pickup.
  - 2.15.13 Payment is made directly to the Purchasing Office before the buyer is permitted to pick up the goods. Payment must be made by check or money order payable to "Messiah College". A copy of the receipt is retained for the surplus folder.
  - 2.15.14 The proceeds of the sale will either return to the department or to the college in general depending on the nature of the disposal. This will be determined in conversation with the Vice President for Finance and other senior administrators.
  - 2.15.15 If an item(s) are neither transferred internally nor sold locally or through public auctions, the item(s) will be stored for up to 2 years during which time the property will be reviewed, advertised and put for bid a last time before it will be trashed.
  - 2.15.16 The item transferred to either another department, storage or for disposal will be recorded in the College's assets management system for either tracking or for removal from our inventory.
3. Fulfillment of Procedures: In order to fulfill these procedures, the Department of Purchasing must enlist your cooperation and promises in return its best effort to help you with your procurement problems. To be most effective, it is necessary that you...
- 3.1 Anticipate your requirements sufficiently in advance to permit the Purchasing Department to do a good job of buying. The axiom "haste makes waste" is particularly true in purchasing.
  - 3.2 Do not make commitments to vendors without the consent of the Director of Purchasing or other authorized personnel in the Purchasing Department.
  - 3.3 Keep strictly confidential all information and quotations submitted by competing vendors.
  - 3.4 Check all deliveries as promptly as possible so that adjustments can be made if necessary.

- 3.5 Improving procurement services are welcome and should be directed to the Purchasing Department. The Director will be glad to have any staff or faculty member discuss procurement problems so that the Purchasing Department is prepared to serve all interests to the best advantage

## Addendum A

### CONTRACT AUTHORIZATION POLICY

DECEMBER 12, 2007

1. For the purposes of this policy, a “contract” is defined as an agreement (including a memorandum of understanding, letter of understanding, purchase order, agreement between student groups and outside entities, or clinical affiliation agreement) which purports to obligate Messiah College to perform some responsibility or to take some specific action.
2. All contracts shall be in writing and executed in the name of Messiah College. Individual employees, schools, divisions, centers, and departments shall not enter into contracts except as specifically authorized.
3. Except as otherwise specified by action of the Board of Trustees, only the President, Provost, Vice President for Finance, Vice President for Operations, and Vice President for Advancement are authorized to execute agreements which legally obligate Messiah College. The President, Provost, Vice President for Finance, Vice President for Operations, and Vice President for Advancement may delegate such authority by a writing specifying the type of agreement to which the delegation pertains and the financial limits imposed thereon. A suggested graduated delegation model by authorized financial limit is as follows:

Level 1 may execute contracts up to \$1,000  
Level 2 may execute contracts up to \$5,000  
Level 3 may execute contracts up to \$25,000  
Level 4 may execute contracts up to \$100,000

All contracts over the amount of \$25,000 must be signed by both the appropriate Vice President or Provost and the person to whom s/he has delegated authority. Each Individual Vice President or Provost retains discretion to set a lower dual-signature financial limit.

4. A contract requiring a financial expenditure of \$ 100,000 or more, or obligating the College to performance over more than 3 years, shall be executed only upon the prior written approval of the President.
5. Exceptions to the \$100,000 presidential approval requirement are as follows:
  - A. Routine purchases of inventory for resale by the bookstore and dining services, or budgeted purchases of books, periodicals, and other media by the library;
  - B. Institutional insurance premiums;
  - C. Student financial aid (institutional and non-institutional);
  - D. Monthly utility services;
  - E. Tuition payments to Temple University and payments for students in study-abroad programs;
  - F. Tax liabilities; and
  - G. Employment contracts and employment-related agreements.

6. Any contract containing a provision requiring the College to indemnify or hold harmless the opposite party shall require legal review and approval prior to execution.
7. A proposed contract for any lease of equipment or real property (whether new, or replacement of current leased equipment), must be given to the Vice President for Finance for review a minimum of 10 days prior to the desired date of lease signing and equipment order or delivery. All final lease documents must be approved in writing by the Vice President for Finance prior to execution, and a copy of the executed lease will be retained in the Business Office.
8. Any contract between Messiah College and a third party service provider which involves disclosure of customer nonpublic financial information as defined by the Gramm-Leach-Bliley Act shall incorporate standard protections requiring the third party to implement and maintain appropriate safeguards.

**Notes:**

- A. The following resolution granting express authority to the President to legally obligate the College was approved by the Board of Trustees on October 19, 2007:

**RESOLVED**, that the President is authorized to legally obligate Messiah College by the execution and delivery of contracts and other written instruments in the name and on behalf of the College. Contracts in excess of \$1,000,000 shall require the signature of both the President, and either the Provost or a Vice President. Contracts in excess of \$5,000,000 shall require the prior authorization of the Board of Trustees. Except as otherwise specified by action of the Board of Trustees, the President may delegate such authority by a written policy establishing conditions and limitations which are appropriate to the prudent management of College obligations.

- B. Several specific Board of Trustees resolutions designate College officers who are authorized to execute agreements which may be contractual in nature. These resolutions relate to real estate transactions, trusts, planned giving instruments, depository and investment accounts, and securities transactions. This administrative policy excludes these types of transactions.
- C. This policy supersedes the contract approval process approved by College Council on October 1, 2003.
- D. This policy is effective November 1, 2007.

Approved by President's Cabinet August 22, 2007  
Approved by College Council September 25, 2007  
Amended by President's Cabinet December 5, 2007  
Amended by President's Cabinet December 12, 2007

**Addendum B**

<b>PURCHASING METHOD - DECISION MATRIX</b>				
January 1, 2008				
<b>A Purchase Order is required for single transactions &gt; \$1,000.00 with the following exceptions:</b>				
<b>1) Travel Related Charges; i.e. hotels/ airfare</b>				
<b>2) As noted under Accounts Payable "Direct Invoice/ Check Request"</b>				
<u>Purchase Category</u>	<u>Permitted Purchasing Card</u>	<u>Prohibited Purchasing Card</u>	<u>Purchasing Department Requires PO = ( * )</u>	<u>Accounts Payable Direct Invoice / Check Request</u>
Accounting Fees		x		x
Advertisements/ Classifieds	x			x
Airline Fares	x			
Alcoholic Beverages	x			
Ammunition		x	x *	
Animals		x	x *	
Application Fees	x			x
Art Supplies	x		x	
ATM Cash		x		
* Cross Cultural Exception	x			
Audio Recordings	x		x	
Audio Visual Equipment		x	x *	
Awards	x		x	
Books	x		x	
Bookstore Merchandise	x			x
Bottled Water		x		x
Business Cards (College Press Only)		x		
Capital Expenditures/ Projects		x	x	
Carpet		x	x *	
Cash Advances		x		
* Cross Cultural Exception	x			
Catering		x		x
Cellular Phones/ Monthly Expenses		x		x
* Consult w/ ITS prior to purchase				
Chemicals		x	x *	
Computer Supplies	x		x	
* Consult w/ ITS prior to purchase				
Conference/ Seminar Registration	x		x	x

	<b>Permitted Purchasing Card</b>	<b>Prohibited Purchasing Card</b>	<b>Purchasing Department Requires PO = (*)</b>	<b>Accounts Payable Direct Invoice / Check Request</b>
Construction Materials		x	x *	
Consulting Services		x	x Preferred	x
Contracts/ Agreements		x	x	x
* Authorized College Signature Required				
Contracted Construction Materials		x		x
* Responsibility of the Contractor				
Controlled Substances		x	x *	
Coffee Services		x		x
Copiers		x	x *	
Custodial Supplies	x		x	
Educational Materials	x		x	
Electrical Supplies	x		x	
Emergency Repairs	x		x	
Energy Management Services	x		x	
Engineering Services	x		x	
Environmental, Fire Safety	x		x	
Exhibit Fees for artwork	x		x	
Explosives		x	x *	
Fax Machines		x	x *	
Film Rentals	x		x	
Financial Services		x		x
Fines/ Penalties		x		x
Flowers (Gifts)		x	x	
Food (Dining Services)				x
Food (Other)	x			x
Freight Services				x
Furniture		x	x *	
Gambling / Lottery Tickets	Not Permitted	Not Permitted	Not Permitted	Not Permitted
Gas Cylinders & Liquid Nitrogen		x	x *	
Gasoline		x		
*Exception for Rental Vehicles	x			
Gifts/ Contributions		x		x
Grounds Supplies	x		x	
Guest Lecturers				x

	<u>Permitted Purchasing Card</u>	<u>Prohibited Purchasing Card</u>	<u>Purchasing Department Requires PO = (*)</u>	<u>Accounts Payable Direct Invoice / Check Request</u>
Hazardous Chemicals		X	X *	
Honoraria				X
Hotels	X			X
Insurance Policies				X
Interlibrary Loans	X			
IT Equipment (PC, Printers, Network)		X	X *	
IT Maintenance Contracts		X	X	
Laboratory Supplies	X		X	
Lease Agreements		X	X *	
Legal Fees		X		X
Library Acquisitions (Books, Periodicals, etc.)	X			X
Licenses	X			X
Loan Payments		X		X
Maintenance Supplies	X		X	
Memberships/ Dues	X			X
Misc Payments		X		X
* Deeds, Legal, Proofreading, Assessment, etc.				
Moving / Relocation Services		X	X *	
Office Supplies		X		
* Phillips EZ Order			Web Orders	
Newsletters	X			X
On-Line Auctions (Ebay)		X		
Paint & Hardware Supplies	X		X	
Payments to Individuals		X		X
Periodicals	X			X
Personal Use		X		
Photo Supplies	X		X	
Postage Stamps	X		X	
Prescription Drugs		X	X *	
Printing (Messiah Name, Seal, Logo)		X	X *	
Professional Services	X		X	
* Architectural, Construction Mgmt., Surveying, Medical				
Professional Training Materials	X		X	

	<u>Permitted Purchasing Card</u>	<u>Prohibited Purchasing Card</u>	<u>Purchasing Department Requires PO = ( * )</u>	<u>Accounts Payable Direct Invoice / Check Request</u>
Publications: On & Off Campus Materials		x	x *	
*Consult Public Relations				
Radioactive Materials		x	x *	
Remodeling Materials		x	x *	
Rental Cars	x			x Travel Services
Rental Items	x		x	
Restaurants	x			
Reprints (Library)	x			
Service Contracts		x	x *	
Shop Supplies	x		x	
Shredders		x	x *	
Software		x	x *	
* Consult w/ ITS prior to purchase				
Subscriptions	x			x
Telephone Equipment & Services	x		x	x
Temporary Help		x		x
Technical Design Services	x		x	
Tobacco Products	Not Permitted	Not Permitted	Not Permitted	Not Permitted
Travel, Entertainment & Related Expenses	x		x	
Travelers Checks		x		
* Cross Cultural Exception				
Travel Expenses (Other)	x			x Travel Reimb.
Uniform/ Institutional Work Attire		x	x *	
Utilities (Electrical, CATV, Telephone, etc.)	x			x
Vehicles		x	x *	
Videos	x		x	
Weapons		Not Authorized	x *	
<b>NOTE: Capital Expenditures/ Projects</b>				
A definition of Capital Expenditures/ Projects is provided in the Business Office "Capital Budget Guidelines".				
Capital Expenditures refers to Equipment, Furniture, Building or External Renovation Projects				
<\$100,000 including change orders may be approved by a Vice President				
>\$100,000 must be approved by the President				

## Addendum C

### I. OFFICE SUPPLIES

Messiah College and “The Phillips Group” have developed a partnership for the acquisition of “Office Supplies”. By consolidating our office supply purchases with one primary company, the department of purchasing can significantly save your department time in searching for office supply products, provide savings through discounted prices, while providing next business day desktop delivery.

The department of purchasing along with Phillips uses:

- a. A deeply discounted list of *commonly used stationary items*
- b. The illustrated catalog of products that can be ordered at our negotiated discount.



To make your office supplies ordering a simple procedure, you may order directly over the web through their program called “Phillips EZ Order”.

When ordering on the web, pricing is at Messiah College’s cost. You will no longer need to calculate/ guess the price. Contact Purchasing for procedures for setting up an account on the Phillips EZ Order.

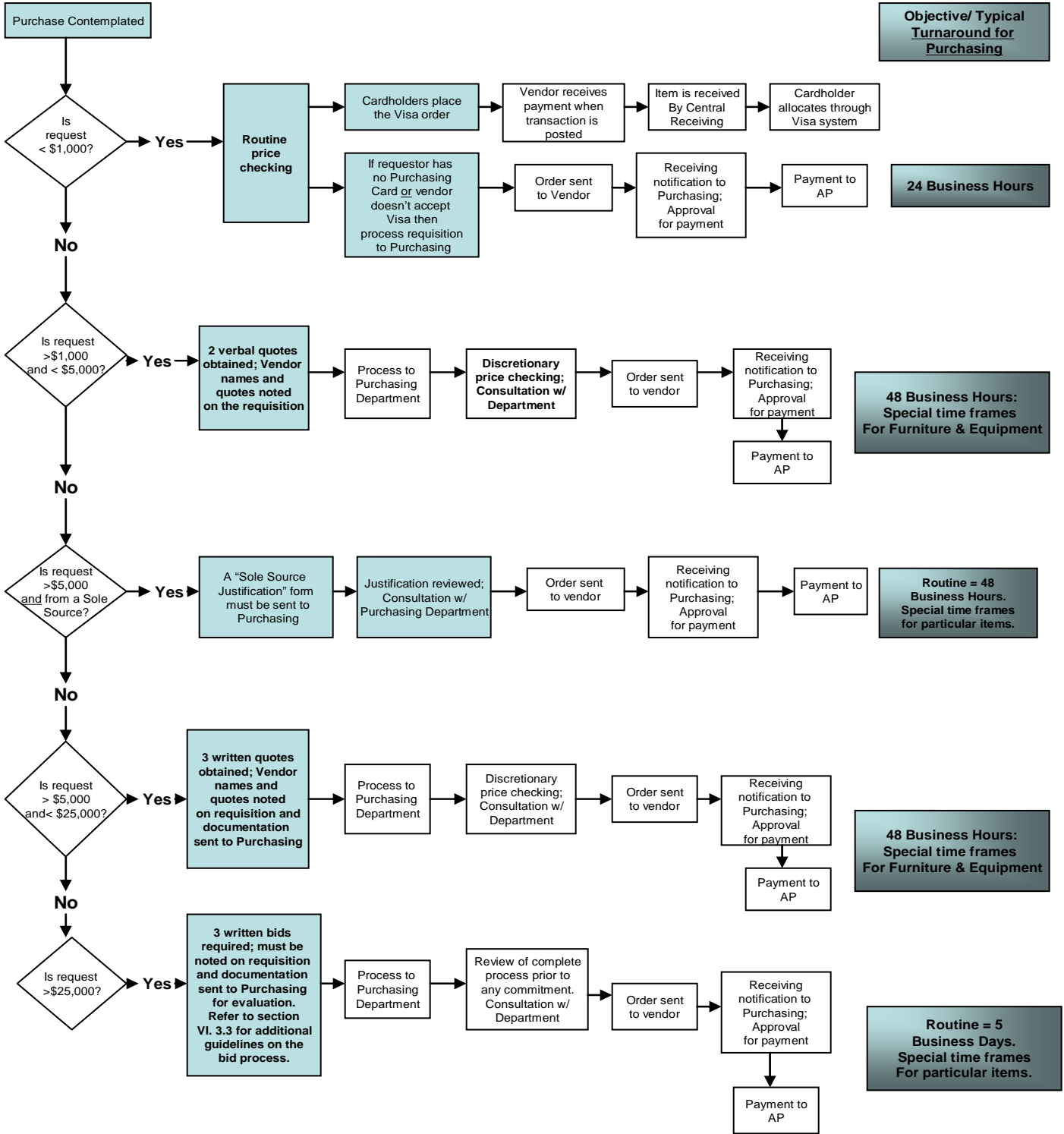
Visa Purchasing Cardholders should purchase from Phillips as well to take advantage of prices and terms negotiated on a college wide contract basis. This policy will save your department additional expenses often incurred such as time and travel to retail stores as well as avoiding paying Pennsylvania Sales Tax often billed at retail stores.



**Addendum D**

**Purchase Order Flow Chart**

**Purchase Contemplated:**  
 1. Check "Purchase Method – Decision Matrix" for Category  
 a. Exceptions – Library Acquisitions, Food, Bookstore Retail  
 b. Exceptions – Permitted Direct Invoice/ Check Requests  
 2. All "Capital Expenditures" must go through Purchasing  
 3. All "Furniture" purchases must be on a Purchase Order -Complete Furniture Request Form  
 4. Consult "Preferred Vendor Cross Reference" for negotiated contracts  
 5. Consult "Sole Source Justification Form" for instructions



Addendum E



**Sole Source Justification Form**

Purpose of this form: To communicate and document the reason for recommending a supplier where (a) competitive bidding was not used or (b) competitive bidding was not feasible due to the sole source nature of the product, service or supplier, for an order that exceeds \$5,000.

Description of Product and/or Service: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Name of Supplier: \_\_\_\_\_

Please select the reason for recommending the above named supplier:

- The requested product is an integral part or accessory to existing equipment.
- The service requested is for existing equipment which can only be completed by the original manufacturer or manufacturer's designated service provider.
- The requested product or service has unique design, performance, and/or quality specifications that are essential to a particular project, teaching need or research and are not available in comparable products.
- The requested service requires a supplier that can demonstrate unique skills or experience.
- Only one supplier is capable of providing supplies, services or construction.
- The goods or services are needed to correct or prevent an emergency health, environmental or safety hazard; special or time sensitive events; and/or emergency repair or replacement of existing equipment essential for daily operations.

**Other Suppliers Contacted:** Note all other suppliers considered for this product or service. Include the reason why the product or service was not acceptable.

a. Supplier: \_\_\_\_\_  
Contact Name & Phone #: \_\_\_\_\_  
Product/ Service Description: \_\_\_\_\_  
Technical Deficiency: \_\_\_\_\_

a. Supplier: \_\_\_\_\_  
Contact Name & Phone #: \_\_\_\_\_  
Product/ Service Description: \_\_\_\_\_  
Technical Deficiency: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

(Forward this form to the Purchasing Department and note this on the requisition form.)

**Addendum F**

<b>MESSIAH COLLEGE</b>				<b>Commonwealth</b>				<b>National</b>	<b>POSG</b>		
<b>PREFERRED VENDOR REFERENCE</b>				<b>Group</b>		<b>Horizon</b>		<b>Joint</b>	<b>Commercial</b>	<b>ProVista</b>	
<b>Call Purchasing to Utilize</b>			<b>CO Stars</b>	<b>Purchasing</b>	<b>E &amp; I</b>	<b>Resource</b>	<b>National</b>	<b>Powers</b>	<b>Interiors</b>	<b>(SciQuest)</b>	<b>US</b>
		<b>Website</b>	<b>(PA)</b>	<b>(Local)</b>	<b>Coop.</b>	<b>Group</b>	<b>IPA</b>	<b>Alliance</b>	<b>(Local)</b>	<b>(Novation)</b>	<b>Communities</b>
<b>Appliances</b>											
	Best Buy Gov.	<a href="http://www.bestbuyedu.com">www.bestbuyedu.com</a>			X			X			
	HD Supply Facility Maint.	<a href="http://www.hdsupplysolutions.com">www.hdsupplysolutions.com</a>									X
	Home Depot	<a href="http://www.homedepot.com">www.homedepot.com</a>									X
<b>Athletic Sport Equip./ Surfaces</b>											
	Atlas Track & Field Surfaces	<a href="http://www.atlastrack.com">www.atlastrack.com</a>						X			
	BSN Sports/ US Games	<a href="http://www.bsnsports.com/njpa">www.bsnsports.com/njpa</a>						X			
	Game Time	<a href="http://www.gametime.com">www.gametime.com</a>									X
	GSV/ Astro Turf USA	<a href="http://www.astroturfusa.com">www.astroturfusa.com</a>									X
	Samson Equipment	<a href="http://www.samsonequipment.com">www.samsonequipment.com</a>						X			
	Sports Surfaces	<a href="http://www.sport-surfaces.com">www.sport-surfaces.com</a>						X			
<b>Athletic Training Supplies</b>											
	Henry Schein	<a href="http://www.henryschein.com">www.henryschein.com</a>			X						
	Meyer Dist.	<a href="http://www.meyerdist.com">www.meyerdist.com</a>			X						
<b>Computer Software</b>											
	Aries Technology	<a href="http://www.aries.net">www.aries.net</a>						X			
	CDW-G	<a href="http://www.cdwg.com">www.cdwg.com</a>				X		X			
	Gov Connection	<a href="http://www.govconnection.com/eandi">www.govconnection.com/eandi</a>			X						
	GTSI	<a href="http://www.gtsi.com">www.gtsi.com</a>									X
	Laserfiche	<a href="http://www.laserfiche.com">www.laserfiche.com</a>			X						
	Schooldude.com	<a href="http://www.schooldude.com">www.schooldude.com</a>						X			
	Tech Depot	<a href="http://www.techdepot.com">www.techdepot.com</a>									X
	Tech. Integration Group	<a href="http://www.tig.com/eandi">www.tig.com/eandi</a>			X						
	Tyler Technologies	<a href="http://www.tylertech.com">www.tylertech.com</a>						X			
<b>Computers &amp; Networking</b>											
	Best Buy Gov.	<a href="http://www.bestbuyedu.com">www.bestbuyedu.com</a>						X			
	Black Box	<a href="http://www.blackbox.com">www.blackbox.com</a>			X						
	CDW -G	<a href="http://www.cdwg.com">www.cdwg.com</a>				X		X			
	Dell	<a href="http://www.dell.com/e&amp;i">www.dell.com/e&amp;i</a>			X						

					Commonwealth				National	POSG		
					Group		Horizon		Joint	Commercial	ProVista	
				CO Stars	Purchasing	E & I	Resource	National	Powers	Interiors	(SciQuest)	US
				(PA)	(Local)	Coop.	Group	IPA	Alliance	(Local)	(Novation)	Communities
<b>Computers &amp; Networking cont'd</b>												
	DISYS		<a href="http://www.disys.com/eandi">www.disys.com/eandi</a>			X						
	Gov Connection		<a href="http://www.govconnection.com/eandi">www.govconnection.com/eandi</a>			X						
	GTSI		<a href="http://www.gtsi.com">www.gtsi.com</a>									X
	HP		<a href="http://www.hp.com/buy/ei">www.hp.com/buy/ei</a>			X						
	IBM/ Cisco		*****			X						
	Lenovo (IBM)		<a href="http://www.lenovo.com">www.lenovo.com</a>				X					
	Tech Depot		<a href="http://www.techdepot.com">www.techdepot.com</a>									X
	Tech. Integration Group		<a href="http://www.tig.com/eandi">www.tig.com/eandi</a>			X						
	Best Buy Gov.		<a href="http://www.bestbuyedu.com">www.bestbuyedu.com</a>									
<b>Electronics &amp; Peripherals</b>												
	Black Box		<a href="http://www.blackbox.com/eandi">www.blackbox.com/eandi</a>			X			X			
	CDW -G		<a href="http://www.cdwg.com">www.cdwg.com</a>				X		X			
	DISYS		<a href="http://www.disys.com/eandi">www.disys.com/eandi</a>			X						
	Gov Connection		<a href="http://www.govconnection.com/eandi">www.govconnection.com/eandi</a>			X						
	GTSI		<a href="http://www.gtsi.com">www.gtsi.com</a>									X
	Panasonic		<a href="http://www.panasonic.com">www.panasonic.com</a>					X				
	Poly Vision		<a href="http://www.polyvision.com">www.polyvision.com</a>			X						
<b>Electronics &amp; Peripherals cont'd.</b>												
	SKC Communication		<a href="http://www.skccom.com">www.skccom.com</a>			X						
	Tech Depot		<a href="http://www.techdepot.com">www.techdepot.com</a>									X
	Tech. Integration Group		<a href="http://www.tig.com/eandi">www.tig.com/eandi</a>			X						
<b>Express Delivery &amp; Freight</b>												
	DHL Express		<a href="http://www.dhl-usa.com">www.dhl-usa.com</a>			X						
<b>Food Service</b>												
	Food Services Program		*****			X						
<b>Furnishings/ Carpet</b>												
	Bentley Prince Street		<a href="http://www.bentleyprincestreet.com">www.bentleyprincestreet.com</a>			X						
	Details		<a href="http://www.steelcase.com">www.steelcase.com</a>			X						
	Interface Americas		*****			X						

					Commonwealth				National	POSG		
					Group		Horizon		Joint	Commercial	ProVista	
				CO Stars	Purchasing	E & I	Resource	National	Powers	Interiors	(SciQuest)	US
				(PA)	(Local)	Coop.	Group	IPA	Alliance	(Local)	(Novation)	Communities
<b>Furnishings/ Carpet Cont'd.</b>												
	InterfaceFLOR	<a href="http://www.interfaceflor.com">www.interfaceflor.com</a>							X			
	Lees Carpet	<a href="http://www.leescarpets.com">www.leescarpets.com</a>				X	X					
	Mannington Commercial	<a href="http://www.mannington.com">www.mannington.com</a>					X					
	Milliken & Company	<a href="http://www.millikencarpet.com">www.millikencarpet.com</a>				X						
	Mity-Lite Inc.	<a href="http://www.mitylite.com">www.mitylite.com</a>				X			X			
	The Mohawk Group	<a href="http://www.mohawkgroup.com">www.mohawkgroup.com</a>				X						
	Tandus US	<a href="http://www.tandus.com">www.tandus.com</a>				X						
<b>Furniture</b>												
	Adden Furniture	<a href="http://www.addenfurniture.com">www.addenfurniture.com</a>				X						
	AGI	<a href="http://www.ki.com">www.ki.com</a>								X		
	All Seating	<a href="http://www.allseating.com">www.allseating.com</a>								X		
	All Steel	<a href="http://www.allsteeloffice.com">www.allsteeloffice.com</a>						X				
	American Seating	<a href="http://www.americanseating.com">www.americanseating.com</a>				X						
	Anthro	<a href="http://www.anthro.com">www.anthro.com</a>										
	Blockhouse	<a href="http://www.blockhouse.com">www.blockhouse.com</a>								X		
	Brayton International	<a href="http://www.brayton.com">www.brayton.com</a>				X						
	Carolina Business Furn.	<a href="http://www.carolinabusinessfurniture.com">www.carolinabusinessfurniture.com</a>								X		
	Chairworks	<a href="http://www.chairworks.com">www.chairworks.com</a>								X		
	Chromecraft	<a href="http://www.chromecraftfurniture.com">www.chromecraftfurniture.com</a>								X		
	David Edward	<a href="http://www.davidedward.com">www.davidedward.com</a>								X		
	Global	<a href="http://www.globaltotaloffice.com">www.globaltotaloffice.com</a>				X						
	Haworth	<a href="http://www.haworth.com">www.haworth.com</a>			X							X
	Herman Miller	<a href="http://www.hermanmiller.com">www.hermanmiller.com</a>										X
	Hon	<a href="http://www.hon.com">www.hon.com</a>						X				
	Inscape	<a href="http://www.inscapesolutions.com">www.inscapesolutions.com</a>								X		
	Jofco	<a href="http://www.jofco.com">www.jofco.com</a>								X		
	KI	<a href="http://www.ki.com">www.ki.com</a>	X				X					X
	Kimball International	<a href="http://www.kimball.com">www.kimball.com</a>					X	X		X		
	Knoll	<a href="http://www.knoll.com">www.knoll.com</a>										X

					Commonwealth				National	POSG		
					Group		Horizon		Joint	Commercial	ProVista	
				CO Stars	Purchasing	E & I	Resource	National	Powers	Interiors	(SciQuest)	US
Furniture Cont'd.				(PA)	(Local)	Coop.	Group	IPA	Alliance	(Local)	(Novation)	Communities
	Metro		<a href="http://www.steelcase.com">www.steelcase.com</a>			X						
	Moduform		<a href="http://www.moduform.com">www.moduform.com</a>			X						
	MTS Seating		<a href="http://www.mtsseating.com">www.mtsseating.com</a>							X		
	National Office Furniture		<a href="http://www.nationalonline.com">www.nationalonline.com</a>				X	X		X		
	Nevers Industries		<a href="http://www.nevers.com">www.nevers.com</a>							X		
	Nova Solutions		<a href="http://www.novasolutionsinc.com">www.novasolutionsinc.com</a>						X			
	Nucraft		<a href="http://www.nucraft.com">www.nucraft.com</a>							X		
	Nuture by Steelcase		<a href="http://www.steelcase.com">www.steelcase.com</a>			X						
	Office Furniture USA		<a href="http://www.ofusa.com">www.ofusa.com</a>				X					
	OFS		<a href="http://www.ofs.com">www.ofs.com</a>							X		
	Palmieri Furniture		<a href="http://www.palmierifurniture.com">www.palmierifurniture.com</a>			X						
	Paoli		<a href="http://www.paoli.com">www.paoli.com</a>							X		
	Poly Vision		<a href="http://www.steelcase.com">www.steelcase.com</a>			X						
	Quaker Furniture		<a href="http://www.qfionline.com">www.qfionline.com</a>							X		
	Safco		<a href="http://www.safcoproducts.com">www.safcoproducts.com</a>							X		
	Sit-On-It		<a href="http://www.sitonit.net">www.sitonit.net</a>							X		
	Source Seating		<a href="http://www.sourceseating.com">www.sourceseating.com</a>							X		
	SouthCo		<a href="http://www.southcofurniture.com">www.southcofurniture.com</a>			X						
	Standard Chair Gardner		<a href="http://www.collegechair.com">www.collegechair.com</a>			X						
	Steelcase		<a href="http://www.steelcase.com">www.steelcase.com</a>			X			X			
	Stelter Partners		<a href="http://www.stelterpartners.com">www.stelterpartners.com</a>			X						
	Turnstone		<a href="http://www.steelcase.com">www.steelcase.com</a>			X						
	United Chair		<a href="http://www.unitedchair.com">www.unitedchair.com</a>							X		
	University Loft		<a href="http://www.universityloft.com">www.universityloft.com</a>			X						
	Vecta		<a href="http://www.steelcase.com">www.steelcase.com</a>			X						
	Versteel		<a href="http://www.versteel.com">www.versteel.com</a>							X		
	Virco		<a href="http://www.virco.com">www.virco.com</a>									X
	Wieland Furniture		<a href="http://www.wielandhealthcare.com">www.wielandhealthcare.com</a>							X		
	Worden Company		<a href="http://www.wordencompany.com">www.wordencompany.com</a>			X						

					Commonwealth				National	POSG		
					Group		Horizon		Joint	Commercial	ProVista	
				CO Stars	Purchasing	E & I	Resource	National	Powers	Interiors	(SciQuest)	US
				(PA)	(Local)	Coop.	Group	IPA	Alliance	(Local)	(Novation)	Communities
<b>Maintenance</b>												
	Auto Zone		<a href="http://www.autozone.com">www.autozone.com</a>									X
	Bobcat		<a href="http://www.bobcat.com">www.bobcat.com</a>						X			
	Bortek Industries (Local)		<a href="http://www.bortekindustries.com">www.bortekindustries.com</a>		X							
	Caterpillar		<a href="http://www.cat.com">www.cat.com</a>						X			
	CentiMark		<a href="http://www.centimark.com">www.centimark.com</a>			X						
	Dauphin Electric (Local)		*****		X							
	Federal Contracts		<a href="http://www.federalcontractscorp.com">www.federalcontractscorp.com</a>						X			
	Franklin Cleaning Tech.		<a href="http://www.franklintechnology.com">www.franklintechnology.com</a>			X						
	Glidden (ICI Paint)		<a href="http://www.iciduluxpaints.com">www.iciduluxpaints.com</a>			X						
	GOJO Industries		<a href="http://www.gojo.com">www.gojo.com</a>				X					
	Grainger		<a href="http://www.grainger.com">www.grainger.com</a>			X			X			
	Graybar		<a href="http://www.graybar.com">www.graybar.com</a>									X
	HD Supply Facility Maint.		<a href="http://www.hdsupplysolutions.com">www.hdsupplysolutions.com</a>									X
	Heritage Bag		<a href="http://www.heritage-bag.com">www.heritage-bag.com</a>				X					
	Hillyard		<a href="http://www.hillyard.com">www.hillyard.com</a>						X			
	Home Depot		<a href="http://www.homedepot.com">www.homedepot.com</a>									X
	Landscape Structures		<a href="http://www.playlsi.com">www.playlsi.com</a>									X
	M-D Wholesale Hardware		<a href="http://www.mdhardware.com">www.mdhardware.com</a>			X						
	Network Services		<a href="http://www.nsconline.com">www.nsconline.com</a>			X						
	Otis Elevator Co.		<a href="http://www.otis.com">www.otis.com</a>				X					
	R F Fager (Local)		<a href="http://www.rffager.com">www.rffager.com</a>		X							
	Sexauer		<a href="http://www.jasmro.com">www.jasmro.com</a>			X						
	Toro		<a href="http://www.toro.com">www.toro.com</a>					X				
	Toter Inc.		<a href="http://www.toter.com">www.toter.com</a>					X				
	ThyssenKrupp Elevator		<a href="http://www.thyssenkruppelevator.com">www.thyssenkruppelevator.com</a>				X					
	Zep Manufacturing		<a href="http://www.zep.com">www.zep.com</a>									X
	Delaware Valley Surgical		<a href="http://www.dvss.biz">www.dvss.biz</a>		X							
	Dimension Medical Supply		<a href="http://www.dmsginc.com">www.dmsginc.com</a>			X						

					Commonwealth				National	POSG		
					Group		Horizon		Joint	Commercial	ProVista	
				CO Stars	Purchasing	E & I	Resource	National	Powers	Interiors	(SciQuest)	US
				(PA)	(Local)	Coop.	Group	IPA	Alliance	(Local)	(Novation)	Communities
<b>Maintenance Cont'd.</b>												
	Hagemeyer (Safety)	<a href="http://www.hagemeyerna.com">www.hagemeyerna.com</a>										X
	Henry Schein	<a href="http://www.henryschein.com">www.henryschein.com</a>				X						
	J & B Medical Supply	<a href="http://www.jandbmedical.com">www.jandbmedical.com</a>						X				
<b>Medical Equip &amp; Supplies</b>												
	LifeGuard Med. Supplies	<a href="http://www.lifeguardmed.com">www.lifeguardmed.com</a>					X					
	School Health Corp	<a href="http://www.schoolhealth.com">www.schoolhealth.com</a>							X			
<b>Moving &amp; Relocation</b>												
	Allied Van Lines	<a href="http://www.movewhalens.com">www.movewhalens.com</a>				X						
		<a href="http://www.nor-calmoving.com">www.nor-calmoving.com</a>				X						
		<a href="http://www.bergerallied.com">www.bergerallied.com</a>				X						
	United Van Lines	<a href="http://www.armstrongrelocation.com">www.armstrongrelocation.com</a>				X						
		<a href="http://www.corriganmoving.com">www.corriganmoving.com</a>										
<b>Multimedia</b>												
	Audio Enhancement	<a href="http://www.audioenhancement.com">www.audioenhancement.com</a>							X			
	Best Buy Gov.	<a href="http://www.bestbuyedu.com">www.bestbuyedu.com</a>							X			
	Black Box	<a href="http://www.blackbox.com">www.blackbox.com</a>				X						
	CCS Presentation	<a href="http://www.ccs-tx.com">www.ccs-tx.com</a>				X						
	LightSpeed Technology	<a href="http://www.lightspeed-tek.com">www.lightspeed-tek.com</a>							X			
	SKC Communication	<a href="http://www.skccom.com">www.skccom.com</a>				X						
<b>Office Equipment &amp; Supplies</b>												
	Block Business Systems	<a href="http://www.block.com">www.block.com</a>			X							
	Canon USA	<a href="http://www.usa.canon.com">www.usa.canon.com</a>							X			
	CDW-G	<a href="http://www.cdwg.com">www.cdwg.com</a>					X		X			
	Corporate Express	<a href="http://www.corporateexpress.com">www.corporateexpress.com</a>			X		X	X				
	IKON Office Solutions	<a href="http://www.ikon.com">www.ikon.com</a>				X						
	Lindenmeyr Munroe	<a href="http://www.lindenmeyr.com">www.lindenmeyr.com</a>			X							
	Neo Post	<a href="http://www.neopost.com">www.neopost.com</a>							X			
	Office Depot	<a href="http://www.officedepot.com">www.officedepot.com</a>										X
	Office Max	<a href="http://www.officemax.com">www.officemax.com</a>				X						

					Commonwealth				National	POSG		
					Group		Horizon		Joint	Commercial	ProVista	
				CO Stars	Purchasing	E & I	Resource	National	Powers	Interiors	(SciQuest)	US
Office Equipment & Supplies Cont'd.				(PA)	(Local)	Coop.	Group	IPA	Alliance	(Local)	(Novation)	Communities
	Poly Vision		<a href="http://www.polyvision.com">www.polyvision.com</a>			X						
	Ricoh, Lanier, Savin		<a href="http://www.ricoh-usa.com">www.ricoh-usa.com</a>									X
	School Speciality Edu.		<a href="http://www.EducationEssentials.com">www.EducationEssentials.com</a>						X			
	Sharp Electronics		<a href="http://www.sharpusa.com">www.sharpusa.com</a>						X			
	Staples Business		<a href="http://StaplesBusinessAdvantage.com">StaplesBusinessAdvantage.com</a>						X			
	Toshiba		<a href="http://www.toshiba.com">www.toshiba.com</a>				X					
	WorkflowOne		<a href="http://www.workflowone.com">www.workflowone.com</a>				X					
	Xerox		<a href="http://www.xerox.com">www.xerox.com</a>			X						
<b>Portable/ Modular Classroom</b>												
	Williams Scotsman		<a href="http://www.willscot.com">www.willscot.com</a>						X			
<b>Procurement</b>												
	GE Corp Services/ AE		*****			X						
<b>Scientific Equipment &amp; Supplies</b>												
	Beckman Coulter		<a href="http://www.beckmancoulter.com">www.beckmancoulter.com</a>			X						
	Burgoon Company		<a href="http://www.bargooncompany.com">www.bargooncompany.com</a>				X					
	Thermo Fisher Scientific		<a href="http://www.hamiltonlab.com">www.hamiltonlab.com</a>			X						
	VWR International		<a href="http://www.vwrsp.com">www.vwrsp.com</a>			X						
<b>Services</b>												
	e-Lynxx Corportation		<a href="http://www.e-LYNXX.com">www.e-LYNXX.com</a>			X						
	EZ-Facts		<a href="http://www.ez-facts.com">www.ez-facts.com</a>		X							
	GE Capital Solutions Fleet		<a href="http://www.gefleet.com">www.gefleet.com</a>			X						
	HireRight		<a href="http://www.HireRight.com">www.HireRight.com</a>			X						
	Kimball Resources		<a href="http://www.kimballresources.com">www.kimballresources.com</a>			X						
	Pealers Flowers (Local)		<a href="http://www.pealers.com">www.pealers.com</a>		X							
	Speciality Underwriters		<a href="http://www.su-group.com">www.su-group.com</a>			X						
	UtiliTech		<a href="http://www.utilitech.com">www.utilitech.com</a>			X						
<b>Travel Services</b>												
	Alamo		<a href="http://www.alamo.com">www.alamo.com</a>				X					
	Avis		<a href="http://www.avis.com">www.avis.com</a>			X						

					Commonwealth				National	POSG		
					Group		Horizon		Joint	Commercial	ProVista	
				CO Stars	Purchasing	E & I	Resource	National	Powers	Interiors	(SciQuest)	US
Travel Services Cont'd.				<u>(PA)</u>	<u>(Local)</u>	<u>Coop.</u>	<u>Group</u>	<u>IPA</u>	<u>Alliance</u>	<u>(Local)</u>	<u>(Novation)</u>	<u>Communities</u>
	Budget		<a href="http://www.budget.com">www.budget.com</a>			X						
	Enterprise		<a href="http://www.enterprise.com">www.enterprise.com</a>			X						
	Hertz		<a href="http://www.hertz.com">www.hertz.com</a>			X	X					
	Marathon Travel		<a href="http://www.e-itavel.com">www.e-itavel.com</a>			X						
	National Car Rental		<a href="http://www.nationalcar.com">www.nationalcar.com</a>				X					
<b>Utility Vehicles</b>												
	E-Z-Go		<a href="http://www.ezgo.com">www.ezgo.com</a>				X					

Addendum G



**Furniture Request Form**

All furniture requests on campus must be processed through the Purchasing Department on a College Purchase Order. Complete the information below and forward to the Purchasing Department, Box 3012.

Project Title or Department Name: \_\_\_\_\_

Desired Delivery Date: \_\_\_\_\_

Type of Space (check one or more):

- \_\_\_\_\_ General Space (Lounges, Lobbies, Break rooms)
- \_\_\_\_\_ Meeting Space (Conference Rooms)
- \_\_\_\_\_ Unique Spaces (Bookstore, Dining Hall, Falcon Express, etc.)
- \_\_\_\_\_ External Spaces
- \_\_\_\_\_ Individual Office
- \_\_\_\_\_ Small Renovation Project (Several offices, classrooms)
- \_\_\_\_\_ Residence Life (Rooms, Lounges, Recreation Space, Kitchens, etc.)
- \_\_\_\_\_ Large Construction Projects (Interior Design work; Large Orders)

Building / External Space: \_\_\_\_\_

Location/ Room(s): \_\_\_\_\_

Brief Description of Furniture Requested:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Contact Information:**

Name: \_\_\_\_\_ E-Mail: \_\_\_\_\_

Account Name: \_\_\_\_\_ Date Submitted: \_\_\_\_\_

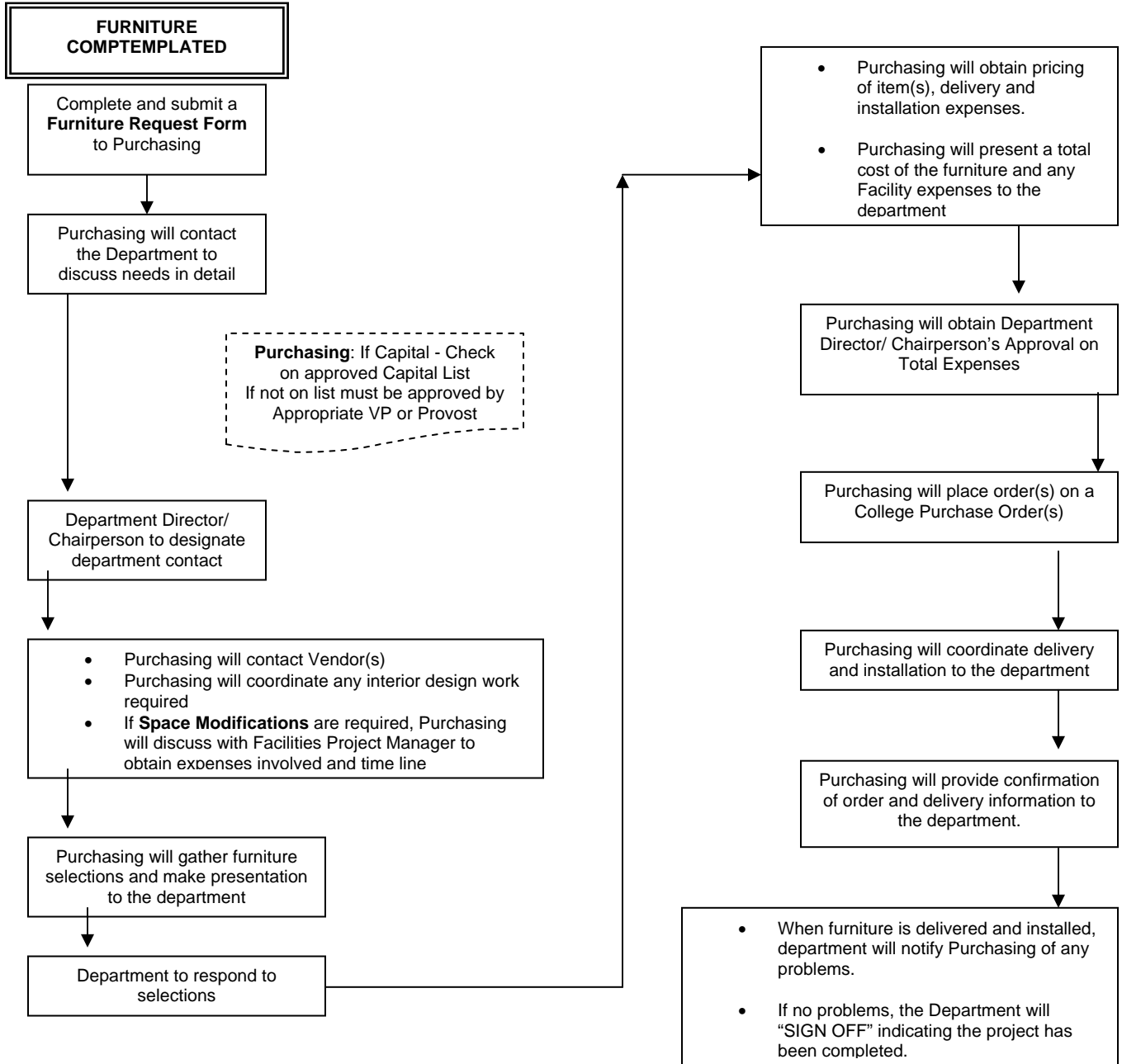
Phone Extension: \_\_\_\_\_



# Addendum I

## Furniture Request Work Flow

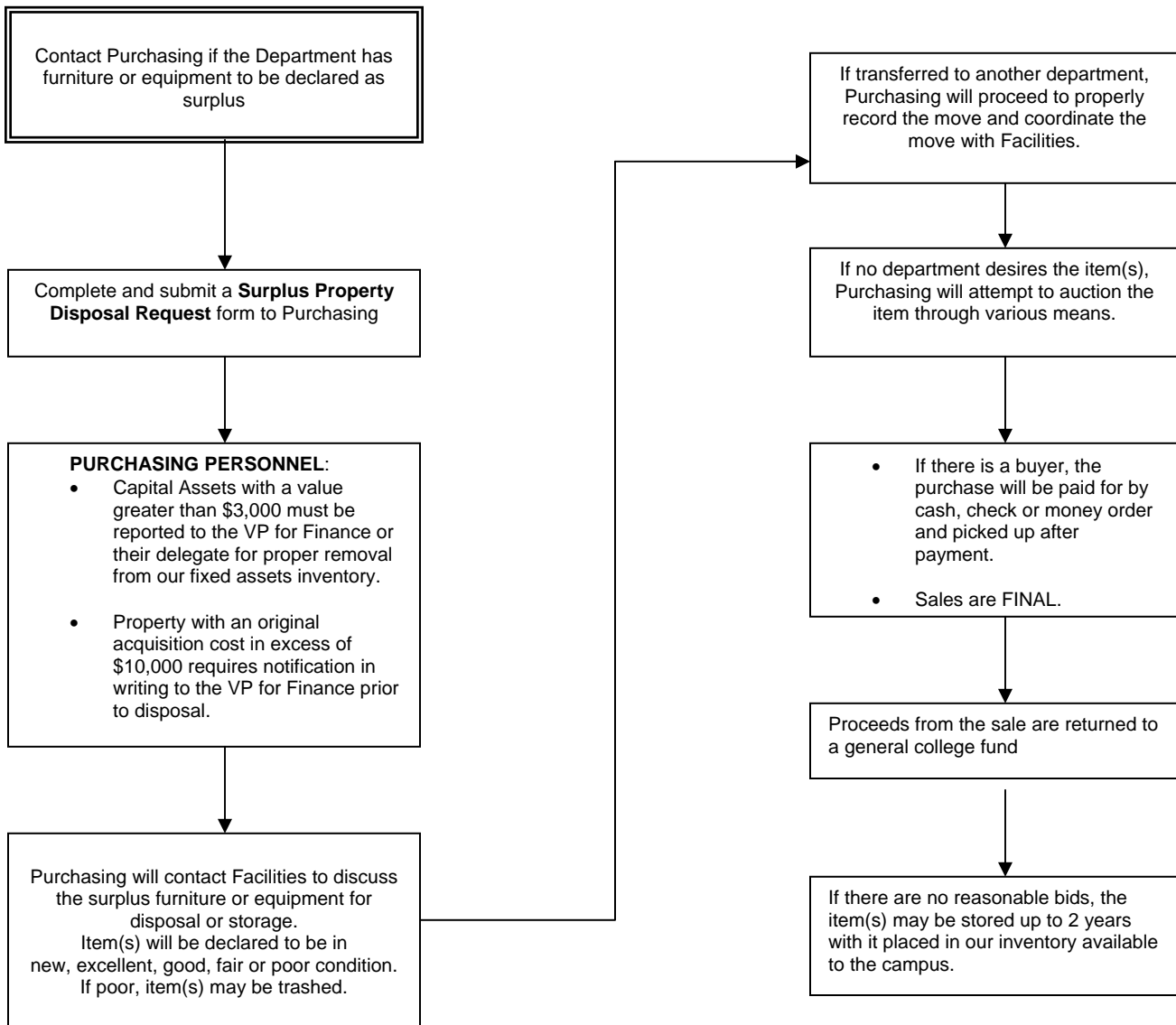
**Policy:** All Furniture Requests **MUST** be processed through the Department of Purchasing  
 All Furniture Orders **MUST** be on a College Purchase Order.  
 If the request is for Residential Furniture or Furniture as part of a large construction project, Purchasing will coordinate directly with Operations and Facilities.



## Addendum J

### Surplus Property Disposal Work Flow

**Policy:** Departments no longer needing furniture or equipment **MUST** contact the Department of Purchasing. Whether items are useful or no longer in a functional condition, departments **MUST** complete a “Surplus Property Disposal Request” form and forward the form to Purchasing. Contact the Environmental Health & Safety Department for proper disposal of any materials that have hazardous chemical compounds.





## Addendum L



### **Conflict of Interest Disclosure Form**

All decisions made in the course of their professional responsibilities by members of the administration, faculty and other employees of Messiah College are to be made solely on the basis of a desire to promote the best interests of the College. A potential conflict of interest occurs when an individual's personal or private interests might lead an independent observer reasonably to question whether the individual's professional actions or decisions are influenced by consideration of significant personal interest, financial or otherwise. Employees may not use their institutional position or affiliation for personal gain, or for the benefit of family members, to the detriment of the College.

There shall be full disclosure by the employee to his or her supervisor of potential conflicts of interest. It shall be the responsibility of the employee to report annually financial benefits of material amount (i.e., exceeding \$250.) including any free or discounted services received by the employee as a result of his or her employment by the College. (Refer to the Messiah College Policy and Procedures Manual: Human Resources Employment Policy 1.12 "*Potential Employee Conflict of Interest*" for additional details).

**Any conflict of interest, potential conflict of interest or appearance of a conflict of interest should be reported by the affected employee to his/her immediate supervisor on an annual basis no later than June 30 of each year.**

The purpose of this disclosure statement is to ensure that direct and indirect financial interests do not conflict with, compromise, or inappropriately influence an employee's performance of college duties. Disclosure is not intended to inhibit professional activities, but to inform administrators (i.e., department/ division heads, deans/supervisors or the Provost) of the facts necessary to determine if a potential conflict of financial interest exists so that they may resolve the problem.

Please list all outside activities for the year (scheduled and projected) that may present a conflict of financial interest or the appearance of a conflict of financial interest:

***College wide reporting requirement.*** In the event that an administrator, faculty member or other employee of the College shall have a *significant financial, personal or professional interest* that could potentially create a conflict of interest or the perception of one in any transaction involving the College, such person shall, as soon as he or she has knowledge of the transaction, take the following actions:

- a. *Disclosure.* Disclose fully in writing the precise nature of his or her interest in such transaction to those at the College involved with the transaction, or to his or her Dean, Department Chairperson, Supervisor, or other independent responsible authority; and
- b. *Non-Participation.* Refrain from participation (including acting individually or as a member of a committee or other group) in the College's consideration of the proposed transaction unless expressly permitted to do so by a responsible authority of the College.

"Significant financial interest" shall mean any direct or indirect interest with monetary value, including but not limited to salary, other payments for services (e.g., consulting fees or honoraria),



**Addendum M**

**Purchase Requisition - Paper**

The official college "Paper Purchase Requisition" is shown below. It is necessary to complete all the information requested.

**Purchase Requisition**

MESSIAH COLLEGE  
Purchasing & Support Systems  
One College Ave. • Grantham, PA 17027

Company Name \_\_\_\_\_  
Address \_\_\_\_\_  
\_\_\_\_\_

OFFICE USE ONLY  
PURCHASE REQUISITION NUMBER

TODAY'S DATE

PURCHASE ORDER NUMBER

DATE REQUIRED

DELIVER TO: NAME \_\_\_\_\_ DEPT. \_\_\_\_\_ ROOM \_\_\_\_\_

ITEM #	QUANTITY	DESCRIPTION	ACCT. NO.	UNIT PRICE	TOTAL AMOUNT
1					
2					
3					
4					
5					
6					
7					
8					
9					

**NOTE:** Cost amount must be shown for encumbrance purposes. Check one box below. Costs shown are from:  
 Price List or Catalog  Your Own Estimate  Quotation (Attach Written Quotation or Give Name of Person Issuing Verbal Quotation.)

COMMENTS: \_\_\_\_\_

REQUESTED BY (Signature) \_\_\_\_\_

APPROVED BY (Signature) \_\_\_\_\_



Addendum O

**BLANKET PURCHASE ORDER  
REQUISITION**

MESSIAH COLLEGE  
Purchasing, Box 3012  
Grantham, PA 17027

(Shaded Areas to Be Completed By Purchasing Department)

DATE: \_\_\_\_\_

PO NUMBER

PO DATE

ACCOUNT NUMBER: \_\_\_\_\_  
ACCOUNT NAME: \_\_\_\_\_

VENDOR NUMBER: \_\_\_\_\_  
VENDOR NAME: \_\_\_\_\_  
VENDOR ADDRESS: \_\_\_\_\_  
PRIMARY CONTACT: \_\_\_\_\_  
*(If Known)*  
VENDOR PHONE NUMBER: \_\_\_\_\_  
VENDOR FAX NUMBER: \_\_\_\_\_

CONDITIONS:  
TIME PERIOD: \_\_\_\_\_ TO \_\_\_\_\_  
"NOT TO EXCEED" DOLLAR AMOUNT: \_\_\_\_\_  
AUTHORIZED PERSONEL TO ISSUE "ORDER RELEASES":  
1. \_\_\_\_\_  
2. \_\_\_\_\_  
3. \_\_\_\_\_  
4. \_\_\_\_\_  
5. \_\_\_\_\_

REQUESTED BY: \_\_\_\_\_ APPROVED BY: \_\_\_\_\_  
*(Signature)* *(Signature)*

COMMENTS: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

APPROVED BY THE DIRECTOR OF  
PURCHASING: \_\_\_\_\_  
*(Signature)*

DATE APPROVED: \_\_\_\_\_

## **Addendum P**

<ABC CO>

<Address>

<Address>

<Date>

<Atten: >

Dear < Name >:

Messiah College has determined that several purchasing techniques might apply when the College does business with your company. Traditionally we have issued a unique purchase order number each time we have ordered materials, supplies, and services. We have analyzed our purchases with your company and would like, if you would honor this request and procedure, to add the use of "*Blanket Purchase Orders*" as another mechanism to purchase from you.

Messiah College would like to establish a "*Blanket Purchase Order*" arrangement with your company using the following guidelines:

- 1) A "*Blanket Purchase Order Letter*" will be the official communication of the establishment of each "*Blanket Purchase Order/ Number*" and the renewal of each when the current "*Blanket Purchase Order/ Number*" has expired.

Only the signature of the Director of Purchasing, the Vice President for Finance or the President are authorized to issue a Messiah College "*Blanket Purchase Order*".

- 2) Your company will designate a representative who we will address our "*Blanket Purchase Order Letter*" to.
- 3) The "*Blanket Purchase Order*" will be written for a specific period of time and/or a "not to exceed total dollar amount". (I.e. Six months or \$ 2,000.00 whichever comes first.) Under no circumstances will the "*Blanket Purchase Order/Number*" be used beyond one of those conditions. Messiah College will be responsible to monitor the expiration of these conditions. Upon the expiration of the current "*Blanket Purchase Order/Number*" a new letter will be sent with a new number.
- 4) There could be more than one "*Blanket Purchase Order/Number*" issued if there are multiple College departments that warrant them. It is the responsibility of Messiah College to provide your company with the correct "*Blanket Purchase Order/ Number*" when a transaction takes place.

The names of those authorized to use the "*Blanket Purchase Order/ Number*" will be listed on the current "*Blanket Purchase Order Letter*".

5) Invoices:

There should be monthly invoicing of all transactions within a 30 day period for each "*Blanket Purchase Order/Number*". It would be desirable to be invoiced the 15th or 30th of each month.

The "*Blanket Purchase Order/ Number*" must appear on each invoice.

Invoices should list all reference/ transactions numbers for the month.

Each "*Blanket Purchase Order Letter*" will contain the location where the invoice may be sent.

While a "not to exceed dollar amount" will be listed on the "*Blanket Purchase Order*" this is not to be construed as the amount that may be purchased but has been developed by looking at past purchases with your company over a given period of time.

The proposed use of "*Blanket Purchase Orders*" will most likely be used in conjunction with a standard Messiah College Purchase Order. The use of either technique is determined internally at the College.

While it is quite likely you have standard guidelines you would like us to follow in the use of "*Blanket Purchase Orders*", please review ours above. If there are concerns, difficulties, or questions, please contact me personally at 717-691-6010. It is the College's desire to begin using "*Blanket Purchase Orders*" with your company this month.

< ABC CO > is a valued supplier to the ongoing operation of our College. We appreciate your consideration and attention to this request. Thank you.

Sincerely,

John E. Cooker, Jr.  
Director of Purchasing