



Purchasing Procedures

Effective Date: 07/01/22	Revised Date:
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PURPOSE

All purchases are processed in accordance with the Coalition Accounting & Financial Policies Procedures Manual (F40.1).

PROCEDURE

Requests for purchases must be submitted via email to purchasinghelpdesk@elcpinellas.org.

There are two ways to complete this:

1. Send an email with the item description and any information you think is valuable to the purchasinghelpdesk@elcpinellas.org. Purchasing will complete all the purchasing documents needed for the item requested
2. Completed a Purchase Request (PR) form and send to purchasinghelpdesk@elcpinellas.org.

PR form must include:

- ❖ Vendor Name & Address (if you prefer this vendor)
- ❖ Name of Staff requesting order
Date
Department
Initials of approving Supervisor
Date Needed
- ❖ Explanation/Reason for Purchase specific to the program/department

- ❖ Complete:
 - Quantity
 - Item Description
 - Unit Price (if available)

- ❖ Cart or picture(s) of items

If a quote was obtained from the vendor, forward the quote with the PR form.

If additional quotes are needed, these will be obtained by the Purchasing Agent.

NOTE: Vendor expenses to date are monitored by Purchasing Agent. If a requested purchase increases a vendor YTD total to about \$34, 900, requester will be notified that another vendor shall be used.

Office Supply Orders: Office supplies are ordered monthly by the purchasing Agent. Staff complete and send the Office Supply Worksheet to Purchasing Helpdesk if a specific item is needed. Monthly by the 15th of the month, Purchasing Agent reviews the requests, checks best pricing and prepares the Purchase Request for office supplies. Supplies are ordered and when received, the facilities staff will store them in the work room for staff use.

Purchase Guidelines:

1. Purchases with a value below \$2,500 require a minimum of one written quote or written record of verbal quotation.
2. Purchases of value between \$2,501 and \$15,000 require a minimum of two (2) written quotes or two (2) written records of telephone quotations.
3. Purchases of value between \$15,001 up to and including Category Two (\$34,900) require a minimum of three (3) written quotations or informal bids.
4. Purchases of value for Category Two of \$35,000 require a Formal Bid Process.

Approval Process:

Upon receipt of the Purchase Request, the Purchasing Agent will:

- Review request, assuring all details are included for processing
- Contact originator for additional information, as needed
- Prepare Purchase Request Form
- Attach supporting documentation to Purchase Request Form
- Prepare quote form
- Prepare Purchasing Checklist
- Submit Purchase Request and all supporting documents to CFO for approval

Order Process:

Upon receipt of the approved Purchase Request, the Purchasing Agent will:

- Process a Purchase Request and Purchase Order
- Submit the Purchase Order to vendor for processing
- Send a copy of the Purchase Order to the requester
- Request Order Confirmation & Shipping Details (as applicable) from vendor
- Once received, forward shipping details to requestor

Once the order is received, the requestor notates on the Packing Slip that all items were received and forwards the signed/dated packing slip to purchasinghelpdesk@elcpinellas.org.

If the packing slip is missing, send an email indicating that all items on PO # are received to the purchasinghelpdesk@elcpinellas.org.

In the event items were missing from the expected delivery, requestor will send a detailed email to the purchasinghelpdesk@elcpinellas.org

Purchasing Agent will contact vendor regarding missing items.

Payment for Order:

Once all items in Purchase Order are received (as indicated on the packing slip), invoice is forwarded to requestor for approval.

Requestor will initial/date invoice and send to accounts.payable@elcpinellas.org to process payment.