

Threshold	Payment Method	Procurement Method
Less than \$10,000 - non-capital items & services ^a _b	Purchase Card OR Check Request	+ 1 Quote
Less than \$10,000 - capital items ^c	Purchase Order	+ 1 Quote
\$10,000 to \$100,000	Purchase Order	+ 3 Quotes OR Existing State or Cooperative contract ^d
Greater than \$100,000	Purchase Order	+ Formal Solicitation ^e OR Existing State or Cooperative contract

Procurement Quick Reference Guide

- a **Non-capital Items:** Individual items with a unit cost of less than \$5,000 in total, including tax, shipping, and set-up costs.
- b **Services:** For some individuals providing services to YC (guest lecturers, performers, artists, etc.) an Independent Contractor agreement may be required. Contact Accounts Payable with questions regarding Independent Contractors. A Certificate of Insurance will also be required for any individuals or suppliers who will be physically present on campus in order to provide services.
- c **Capital Items:** individual items with a unit cost greater than \$5,000 in total, including tax, shipping, and set-up costs. Capital items must be purchased via purchase order in order to generate an asset tag and ensure the item is properly tracked at YC.
- d **Existing State or Cooperative Contract:** In some instances, YC may purchase off of a competitively bid, pre-existing state or cooperative contract, in lieu of obtaining 3 quotes. Procurement staff can assist you with identifying these contracts and suppliers that hold them.
- e **Formal Solicitation:** A publicly advertised bidding opportunity conducted by Procurement staff. Contact Procurement for information on how formal solicitations are conducted. Exceptions may be granted when a formal solicitation is not practical. In these cases, a Sole or Single Source Determination may be considered, but these must be evaluated by Procurement staff.

Important Reminders

- This guide does not cover all purchasing situations – if you have questions or are working on a complex purchase, contact Procurement ASAP so that we can assist!
- Thresholds are on a *per vendor per fiscal year basis* – regardless of whether you are making a single large purchase or many small purchases, the thresholds and applicable policies are still in effect.
- YC has designated the ability to sign contracts to the Director of Procurement & Contract Services only – purchasing liaisons and budget managers may not sign contracts on behalf of YC.
- In some special cases, purchases may require approval from other parties besides just your budget manager – see next page:



Special Purchasing Cases Requiring Additional Approvals

Is the purchase item(s) or service(s) with Terms & Conditions?	Submit to Procurement & Contract Services for review prior to placing the order	Email: Procurement@yc.edu
Is the purchase services that will take place on campus?	Supplier must provide a Certificate of Insurance to Procurement & Contract Services prior to arriving on campus	
Is there a potential Conflict of Interest regarding this purchase (see policy 2.2 for explanation)?	Inform Procurement & Contract Services immediately and prior to placing the order: competitive quotes must be acquired and an HR form must be completed	
Will the purchase be placed on the floor, hung on the wall, used outdoors, or have electrical needs?	Submit an explanation of the purchase to Facilities for approval prior to placing the order	Email: Facilities@yc.edu
Is the purchase computer hardware, software, or telephone-related?	Submit an explanation of the purchase to ITS for approval prior to placing the order	Email: Helpdesk@yc.edu
Is the purchase food or beverages for an Official Function?	Complete Official Functions form (signed by Budget Manager and VP) and submit with purchase documentation (P-card, check request, or requisition)	Email: Accountspayable@yc.edu
Is the purchase printing or photocopy equipment?	Submit an explanation of the purchase to Mail, Print, and Distribution Services for approval prior to placing the order	Email: Distributionservices@scholar.yc.edu
Is the purchase advertising or promotional services?	Submit an explanation of the purchase to Marketing for approval prior to placing the order	Email: Tim.Diesch@yc.edu

Agreement or Contract Type	Review & Approval Routing	YC Authorized Signatory
<p style="color: red;">All agreements (* see exceptions) with terms and conditions, regardless of dollar amount, MUST be reviewed by a Procurement & Contract Services (PCS) Staff Member <u>prior to execution and/or ANY commitment for goods or services.</u></p> <p style="color: red;">NOTE: The "Contract Owner" is the PROCUREMENT Contract Owner and can be found on the Procurement & Contract Services (PCS) Website</p>		
<p>Agency Affiliation Agreement: An Agreement between YC and a local agency to provide students with clinical experiences.</p>	<ol style="list-style-type: none"> 1. Dean/ Director 2. Procurement Contract Owner (if any revisions to the YC template) 	<p>Dean/ Director (if no revisions to the YC Procurement approved template) Procurement Contract Owner (only required if any revisions to the YC template)</p>
<p>Credit Applications Required by some companies before YC can do business with them. Many have terms and conditions they ask for YC to accept and sign. Our preference would be to send our standard document with our credit references.</p>	<ol style="list-style-type: none"> 1. Procurement@YC.edu 2. Procurement PO Owner (sends our standard credit reference document) 3. Procurement Specialist or Director of PCS (only if they do not accept 2 above) 	<p>Procurement Specialist or Director of PCS</p>
<p>Experiential Education Agreement (Internship Agreement): An Agreement between YC, a local agency, and a YC student to provide the student with unpaid, uncredited internship experience.</p>	<ol style="list-style-type: none"> 1. Dean/ Director 2. Procurement Contract Owner (Only applies if there are changes to the standard YC template) 	<p>Dean/ Director</p>
<p>Facility Use Agreement – Off-Site: An Agreement that allows YC to use or rent the facilities of an outside entity, such as a local business or another college.</p>	<ol style="list-style-type: none"> 1. Dean/ Director 2. Procurement Contract Owner 	<p>\$5,000 or less: Buyer (if Contract Owner) \$20,000 or less: Procurement Specialist or Director of PCS \$20,001 or more: Director of PCS</p>
<p>Facility Use Agreement – On-Site*: An Agreement, allowing another party to rent space on-site at one of YC campuses or centers (such as a local business or another college)</p>	<ol style="list-style-type: none"> 1. Residence Hall Director 2. Procurement Contract Owner (Only applies if there are changes to the standard template) 	<p>Residence Hall Director</p>

Agreement or Contract Type	Review & Approval Routing	YC Authorized Signatory
<p>Independent Contractor Agreements - Low Risk and less than \$10,000 Annually: An Agreement between YC and an individual to perform services, such as a guest lecturer, performer, artist, athletic linesman, etc. Requires verification by the YC Business Office (email that the individual qualifies as an Independent Contractor).</p>	<ol style="list-style-type: none"> 1. Business Office Manager 2. Dean/ Director 3. Procurement Contract Owner (if ANY changes to the Procurement Approved Independent Contractor Agreement Template) 	<p>Dean / Director (or Accounting Manager) if <u>no changes</u> to the YC Procurement Approved Independent Contractor Agreement template, <u>AND</u> not considered a potential conflict of interest, otherwise (if there are changes or potential conflict): \$5,000 or less: Buyer (if Contract Owner) \$20,000 or Less: Procurement Specialist \$20,0001 or more: Director of PCS</p>
<p>Independent Contractor Agreement - High Risk and/or Greater than \$10,000: An Agreement between YC and an individual to perform services, such as a guest lecturer, performer, artist, athletic linesman, etc. Requires verification by the YC Business Office that the individual qualifies as an Independent Contractor.</p>	<ol style="list-style-type: none"> 1. Dean/ Director 2. Procurement Contract Owner 	<p>\$20,000 or less: Procurement Specialist or Director of PCS \$20,001 or more: Director of PCS</p>
<p>Intergovernmental Agreement (IGA): Between YC and another government agency, such as a school district or municipality.</p>	<ol style="list-style-type: none"> 1. Procurement Contract Owner 2. Outsourced Legal Counsel 3. Vice President 4. President 5. DGB 	<p>Outsourced Legal Counsel & DGB Chair</p>
<p>Lease Agreements for Employee Use* of YC Owned or Leased Facilities (Inspiration Apartments, RV Pad Rentals & RV Rentals)</p>	<p>Chief Human Resource Officer (with VP, Finance and Admin Services as a back-up)</p>	<p>Chief Human Resource Officer (with VP, Finance and Administrative Services as a back-up)</p>
<p>Lease Land Agreement: Between a landowner and tenant to allow use of the land for a set period of time.</p>	<ol style="list-style-type: none"> 1. Procurement Contract Owner 2. President 3. DGB (if 1+ years or >\$200,000) 	<p>President and/or DGB Chair</p>

Agreement or Contract Type	Review & Approval Routing	YC Authorized Signatory
<p>Memorandum of Understanding/ Agreement (MOU/ MOA): An Agreement between YC and another party containing the terms and conditions and each parties responsibilities.</p>	<ol style="list-style-type: none"> 1. Procurement Contract Owner 2. Vice President 3. President 	Procurement Specialist (if Contract Owner) or Director of PCS
<p>Order Forms: An order form for the purchase of any goods or services that contains terms and conditions, references a link to URL terms somewhere in the order form and/or requires a signature (regardless of the dollar value).</p>	<ol style="list-style-type: none"> 1. Procurement Contract Owner 2. Dean / Director 	\$5,000 or less: Buyer (if Contract Owner) \$20,000 or less: Procurement Specialist or Director of PCS \$20,001 or more: Director of PCS
<p>Services Agreement: An Agreement between YC and a supplier who will provide services to the college and requires YC to execute their Agreement.</p>	<ol style="list-style-type: none"> 1. Procurement Contract Owner 2. Dean Director 	\$5,000 or less: Buyer (if Contract Owner) \$20,000 or less: Procurement Specialist or Director of PCS \$20,001 or more: Director of PCS
<p>Software as a Service (SaaS Agreement): An Agreement between YC and a supplier who will provide Software as a Service (e.g., Salesforce, Oracle, Microsoft, Forms Software, Scheduling Software, etc.) to YC.</p>	<ol style="list-style-type: none"> 1. Procurement Contract Owner 2. ITS Manager 3. Dean / Director 	\$5,000 or less: Buyer (if Contract Owner) \$20,000 or less: Procurement Specialist or Director of PCS \$20,001 or more: Director of PCS
<p>Third Party Funding Agreement An Agreement between YC and a third party that is paying for classes on behalf of a student.</p>	<ol style="list-style-type: none"> 1. Business Office Manager 2. Dean/ Director 3. Procurement Contract Owner (if ANY changes to the Procurement Approved Third Party Funding Agreement Template) 	Dean / Director (or Accounting Manager) <u>if no changes</u> to the YC Procurement Approved Third Party Funding Agreement template
<p style="text-align: center;">Other Agreements: If your type of Agreement is not listed, please reach out to Procurement@yc.edu with questions.</p>		

Please direct all general requests for assistance to Procurement@yc.edu so that we can log your request & route it to the correct staff member.

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