



Trinity College
HARTFORD CONNECTICUT

Trinity College Procurement Policy General

This is the general College procurement policy. Some departments that have unique needs will receive procurement policy statements that are tailored for their specific operations.

Objective for procurement policy

- to assist the College Community with the selection and acquisition of products, equipment and services
- to safeguard the College's assets
- to standardize the way purchases are made College wide
- to insure purchases are made from approved vendors
- to insure that the College receives value for expenditures made
- to insure purchases made with College funds are consistent with the College's mission
- to prevent unauthorized purchases
- to insure that, when financially feasible, purchases will support and advance the College's commitment to sustainability practices for resource conservation, reduction of waste and pollution, minimizing our environmental footprint, as adopted under the Presidents' Climate Commitment (PCC)

Classes of procurement and purchases made with College funds

- capital (items costing more than \$1,000 with a useful life of a year or more)
- furniture and equipment
- supplies required for office operations
- travel and entertainment
- utilities
- services
- contractors

Purchasing guidelines for incorporating sustainable practices into daily decision making when financially feasible

- Requirements when making appliance purchases that the units are ENERGY STAR certified products in all areas for which ratings exist
- Preference is to be given to:
 - "green" furnishings and building materials.
 - recycled content paper and other office materials,

- water- and energy-efficient devices,
- items from our vendors with less packaging
- materials which can be returned to the manufacturer for reuse or recycling
- Buy locally produced goods and services whenever possible
- Buy EPEAT silver rated computers and electronics whenever available

Vehicles

Trinity College is firmly dedicated to reducing greenhouse gas emissions from fleet vehicles across campus. Prior to each new vehicle purchase or lease, the purchaser must work with the Director of Purchasing to conduct a thorough review of the gas-electric hybrids, electric and alternative fuel vehicles options. Additionally, the Director of Purchasing will notify the Sustainability Taskforce regarding the upcoming purchase, allowing them to submit any vehicle recommendations they may have. Smaller models with higher fuel-efficiency will be purchased when practical.

Individuals authorized to make purchase commitments and appropriate level of authorization

Department Heads (directors/managers)

- Approved to make individual purchases of up to \$5,000 per purchase order
- Approved to make annual purchases for amounts less than or equal to available budget
- Approval may be delegated, however, ultimate responsibility for commitments remains with the department head
- Approval to make commitments restricted to expenditure classes in budget
- Rubber stamped signature facsimiles are not acceptable.

Principal Investigators and Project Managers

- Approved to make individual purchases of up to \$5,000 per purchase order
- Approved to make commitments for amounts less than or equal to available budget
- Approval may be delegated, however, ultimate responsibility for commitments remains with principal investigator and project manager
- Approval to make commitments restricted to expenditure classes in budget

Purchasing Department

- All individual requests/requisitions over \$5,000 require the Director of Purchasing's approval.

Authorizations and sample signatures must be on file with Accounts Payable.

Approvals required prior to purchase or commitment

Approvals must be obtained prior to initiation of purchase or commitment, not when invoice or statement for purchase or commitment is received.

Purchase Orders

Purchase Orders are required before any purchases are made. Once the request or requisition has been approved, a purchase order will be issued. The exceptions to this rule are:

1. WB Mason online office supply orders.
2. Orders to be paid for with a Trinity College issued Corporate Credit Card

Bidding and Approved Vendors

Competitive bids may be required for some purchases. A minimum of three (3) bids/quotes, where practical, for products and services in excess of \$10,000. A copy of the bid/quote must be sent to the Purchasing Office for review. In cases where the lowest bid/quote is not being selected, appropriate documentation explaining the reason(s) why the particular vendor was selected is necessary. Sole source vendors are exempt from this bidding policy.

Conflicts of Interest

Trinity College employees who act on its behalf must avoid any situations that could result in a conflict of interest or even the appearance of a conflict of interest. Employees must not use their position within the College to influence outside vendors for their own personal gain.

The Purchasing Department will post and periodically update a list of preferred vendors on the purchasing webpage.

Purchases or commitments in excess of \$50,000 must be approved by the appropriate line officer (senior group officer) and by The Comptroller's Office. Purchase or commitment amount is defined as invoice total or aggregate value of purchase.

Additional approval required for agreements or contracts containing specific terms and conditions

The Comptroller and The Vice President of Finance must approve

- all commitments in excess of \$100,000
- all agreements or contracts containing hold harmless, indemnification or other legal terms and conditions
- all agreements and contracts committing the College to provide insurance for another organization or individual
- all agreements or contracts requiring matching or in-kind contributions from the College