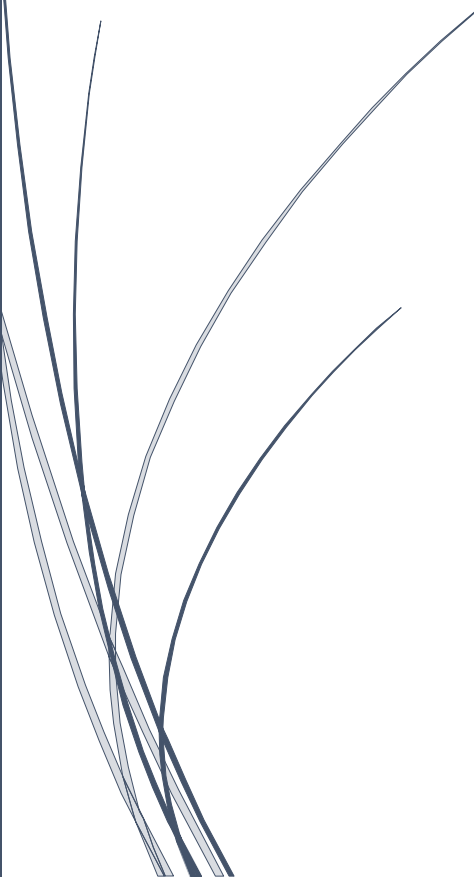


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HORRY- GEORGETOWN TECHNICAL COLLEGE

Procurement Manual



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HORRY-GEORGETOWN TECHNICAL COLLEGE

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AUTHORITY, POLICIES AND ORGANIZATION

A. Purpose of Manual

This manual is provided, only as a guide, to assist departments of Horry-Georgetown Technical College (HGTC) in the procurement of supplies, equipment, and services required in their respective operations; and, to serve as a guide for the budgetary control of costs of purchases.

Procedures outlined herein apply regardless of the source of funds. Federal guidelines will supersede state guidelines.

Although this manual is not intended to completely cover the internal operations of the College's procurement department, certain phases of its operation are included for clarification purposes of the procedures stated herein.

B. Authority of the Procurement Department

The South Carolina Consolidated Procurement Code is the basis for purchasing decisions. Under the authority delegated to HGTC by the South Carolina State Fiscal Accountability Authority (SFAA), Bylaws of the Horry-Georgetown Technical College Area Commission, in conformity with provisions, regulations/policies of the State Board for Technical and Comprehensive Education, the Procurement Department under the supervision of the Vice President for Finance and Administration has the responsibility for:

1. Supporting the educational mission of the college by procuring supplies, equipment, and services required for the college's operation.
2. Provide purchasing services to all departments and locations that are part of the college.
3. Procuring such commodities and services in the most efficient, economical and responsible manner while ensuring fair and equitable treatment of all persons who deal with the procurement department.
4. Provide for competitive procurement while applying the rules of the SC Consolidated Procurement Code and Regulations Annotated.
5. Assisting the College with handling all construction projects in regard to the proper documentation required by OSE.

C. Determination of Compliance

It is the intent of the HGTC Procurement Department to adhere to and abide by the policies, procedures and guidelines relating to the procurement, management and control of supplies and services, as applicable under the authority of the South Carolina Consolidated Procurement Code and Regulations Annotated.

The Procurement Manager oversees all purchases up to the most recent certification limits granted by the State Procurement Office. The following is a list of those limits:

Supplies & Services	\$250,000
Information Technology	\$150,000
Consultant Services	\$250,000
Construction Services	\$150,000
Construction contract Change Order	\$25,000
Architect/Engineer Contract Amendment	\$10,000

The Procurement Manager submits procurements above these limits to SFAA Procurement Services to be processed by State Procurement or to request delegation of authority to process the solicitation. For any and all construction projects, the Office of State Engineers is included and all proper documentation is forwarded through their office for approval.

D. Ethical Standards

Horry Georgetown Technical College Procurement Department adheres to the Code of Ethics as adopted by the National Association of Educational Procurement:

1. *Give first consideration to the objectives and policies of my institution.*
2. *Strive to obtain the maximum value for each dollar of expenditure.*
3. *Decline personal gifts or gratuities.*
4. *Grant all competitive supplier's equal consideration insofar as state or federal statute and institutional policy permit.*
5. *Conduct business with potential and current suppliers in an atmosphere of good faith, devoid of intentional misrepresentation.*
6. *Demand honesty in sales representation whether offered through the medium of a verbal or written statement, and advertisement, or a sample of the product.*
7. *Receive consent of originator of proprietary ideas and designs before using them for competitive purchasing purposes.*
8. *Make every reasonable effort to negotiate an equitable and mutually agreeable settlement of any controversy with a supplier; and/or be willing to submit any major controversies to arbitration or other third-party review, insofar as the established policies of my institution permit.*
9. *Accord a prompt and courteous reception, insofar as conditions permit, to all who call on legitimate business missions.*
10. *Cooperate with trade, industrial and professional associations, and with governmental and private agencies for the purpose of promoting and developing sound business methods.*
11. *Foster fair, ethical and legal trade practices.*
12. *Counsel and cooperate with all Faculty and Staff and promote a spirit of unity and a keen interest in professional growth among them.*

E. (1) General Application. This code applies only to contracts solicited or entered into after the effective date of this code unless the parties agree to its application to a contract entered into prior to its effective date.

(2) Application to State Procurement. This code applies to every procurement or expenditure of funds by this State under contract acting through a governmental body as herein defined irrespective of the source of the funds, including federal assistance monies, except as specified in Section 11-35-40(3) (Compliance with Federal Requirements) and except that this code does not apply to gifts, to the issuance of grants, or to contracts between public procurement units, except as provided in Article 19 (Intergovernmental Relations). Notwithstanding the foregoing, the provisions of Article 23 (Statewide Provisions) apply as provided therein. It also shall apply to the disposal of state supplies as provided in Article 15 (Supply Management). No state agency or subdivision thereof may sell, lease, or otherwise alienate or obligate telecommunications and information technology infrastructure of the State by temporary proviso and unless provided for in the general laws of the State.

(3) Compliance with Federal Requirements. Where a procurement involves the expenditure of federal assistance, grant, or contract funds, the governmental body also shall comply with federal laws (including authorized regulations) as are mandatorily applicable and which are not presently reflected in this code; however, failure to comply with the foregoing is not subject to review under Article 17. Notwithstanding, where federal assistance, grant, or contract funds are used in a procurement by a governmental body as defined in Section 11-35-310(18), this code, including any requirements that are more restrictive than federal requirements, must be followed, except to the extent such action would render the governmental body ineligible to receive federal funds whose receipt is conditioned on compliance with mandatorily applicable federal law. In those circumstances, the solicitation must identify and explain the impact of such federal laws on the procurement process, including any required deviation from this code.

(4) The acquisition of a facility or capital improvement by a foundation or eleemosynary organization on behalf of or for the use of any state agency or institution of higher learning which involves the use of public funds in the acquisition, financing, construction, or current or subsequent leasing of the facility or capital improvement is subject to the provisions of this code in the same manner as a governmental body. The definition and application of the terms "acquisition", "financing", "construction", and "leasing" are governed by generally accepted accounting principles.

F. Payment of Goods and Services

In accordance with Section 11-35-45 of the Consolidated Procurement Code, payment for services, supplies, or information technology must be rendered within 30 days after satisfactory acceptance of the goods and services and a proper invoice. Occasionally, there are instances when a small vendor or new vendor may request a partial payment with order. If deemed appropriate by the Procurement Manager, the College will provide partial prepayments.

G. Public Access to Procurement Information

Procurement Information must be a public record to the extent required in Chapter 4 of Title 30 (The Freedom of Information Act) with the exception that commercial or financial information obtained in response to a 'Request for Proposals' or any type of bid solicitation that is privileged and confidential, need not be disclosed.

Privileged and confidential information is information in specific detail not customarily released to the public, the release of which might cause harm to the competitive position of the party supplying the information. See Section 11-35-410 for specific types of information.

Evaluative documents pre-decisional in nature such as inter-agency or intra-agency memoranda containing technical evaluations and recommendations are exempted so long as the contract award does not expressly adopt or incorporate the inter-agency or intra-agency memoranda

For all documents submitted in response or regarding any solicitation or other request, the person submitting the documents shall comply with instructions provided in the solicitation for marking information exempt from public disclosure. Information not marked as required by the applicable instructions may be disclosed to the public.

H. Conflict of Interest

It is the responsibility of the Procurement Manager to take all appropriate steps to assure that the College does not, knowingly, enter into any purchase commitment that could result in a conflict-of-interest situation.

I. Procurement Organization

A chart showing the organization of the Procurement Office of Horry Georgetown Technical College is attached. **See attachment #1**

J. Procurement Training and Certification

It is the intent of Horry-Georgetown Technical College to promote and sponsor participation in procurement training and certification of procurement personnel as stated in 11-35-1030. The procurement staff offers training for any faculty and staff that require use of the electronic requisitioning process and p-card use annually or as needed.

K. Drug Free Workplace

The State of South Carolina has amended Title 44, Code of Laws of South Carolina, 1976, relating to health, by adding Chapter 107, to enact the Drug-Free Workplace Act. The College will comply with Section 44-107-20 of the Drug-Free Workplace Act by requiring vendor certification on all contracts of \$50,000.00 or more that a drug-free workplace has been provided for their employees.

L. The Official State Government Publication

“*South Carolina Business Opportunities*” (SCBO) is the official state government publication and is published daily by the State Fiscal Accountability Authority, Procurement Services. The purpose of the publication is to provide a listing of proposed procurements of construction, information technology, supplies, goods, services, and other procurement information of interest to the business community. This publication is available on the Internet at <https://scbo.sc.gov/>

M. Exemptions.

The State Fiscal Accountability Authority has exempted specified supplies, services, information technology or construction from the purchasing procedures required in Section 11-35-710. <https://procurement.sc.gov/files/20190920%20Legal%27s%20Exemption%20Table%20%28booklet%29.pdf>

N. Accounting and Fiscal Reporting

The Office of Audit and Certification shall review the adequacy of the College's internal controls to ensure compliance with the requirements of the South Carolina Consolidated Procurement Code and Regulations. Non-compliances, if any shall be reported to the audited governmental body, the State Fiscal Accountability Authority. The auditors shall provide in writing proposed corrective action to the College. Based upon audit recommendations by the Office of General Services, the board may revoke certification as provided for in Section 11-35- 1210 and require the College to make all procurements through the office of Materials Management above a dollar limit set by the board until such time as the board is assured of compliance with the South Carolina Consolidated Procurement Code and the regulations by the College.

O. Authority to Contract for Auditing Services

Prior to the award of any state contract for auditing or accounting services, approval for such services shall be obtained from the State Auditor's office. Procurement of such services shall be made in accordance with the Procurement Code Section 11-35-1250. <http://osa.sc.gov/leadership/sue-f-moss-cpa/>

P. Authority to Contract for Legal Services

Procurement of such services shall be made in accordance with the Procurement Code Section 11-35-1260. Prior to the award of any state contract for the services of attorneys, approval for such services shall be obtained from the State Attorney General. <http://www.scag.gov/civil>

Q. Procurements at Auction

The college when participating in an auction shall follow the guidelines as set forth in the Code 11-35-1575. The college shall

- (a) survey the needed items being offered to ascertain their condition and usefulness
- (b) determine a fair market value for new like items through informal quotes
- (c) determine the fair market value from similar items considering age and useful life, and
- (d) estimated repair cost and delivery cost, if any, of the desired items

Using this information, the college shall determine the maximum price that can be paid for each item desired. At the auction, the college shall not exceed the maximum price so determined.

R. Food Service Contract

Any food service contracts entered into shall be solicited under Code Section 11-35-1530, Competitive Sealed Proposals and Regulation 19-445.2095. A review panel composed of members from the college and the Materials Management office shall review proposals and approve it prior to contract award.

XV. METHOD OF SOURCE SELECTION, CONTRACTS AND AUDITS, MODIFICATIONS AND TERMINATION OF CONTRACTS AND COST PRINCIPLES

Small Purchases:

1. The College will follow the directions as outlined in the worksheet provided by State Procurement. **See attachment #2.**
- 2 Competition and Price Reasonableness.
 - 2.1 Purchases Not in Excess of \$10,000.00:** No competition: Small purchases not exceeding \$10,00.00 may be accomplished without securing competitive quotations if the prices are considered to be fair and reasonable. Procurement shall annotate on the purchase order – “Price is fair and reasonable” The Purchasing Card is used for small purchases when a purchase order is impossible or impractical and audited on the back end by Accounting. Such purchases shall be distributed equitably among qualified suppliers. Action to verify the reasonableness of the price will need to be taken only when Procurement suspects that the price may not be reasonable, e.g., comparison to previous price paid personal knowledge of the item involved. If a quote is obtained, the order will be placed with the vendor offering the lowest responsive and responsible bid.
 - 2.2 Purchases from \$10,000.01 to \$25,000.00:** Three bona fide written quotes are required. Quotes must be attached to the purchase requisition or scanned and saved on-line in the Accounting Department. The award must be made to the lowest responsive and responsible offeror. The request for quotes must include the ship-to address, a product description, and unit price. Requests must be distributed equally among qualified offerors. NOTE: If it is not possible to obtain three bids, then the request must be advertised in SCBO
 - 2.3 Purchases from \$25,000 to \$50,000:** This section shall be called RFQ’s or Request for Quote. Written solicitation for quotes shall be made. The procurement must be advertised in SCBO at least once. A copy of the written solicitation and written quotes must be attached to the purchase requisition. The award must be made to the lowest responsive and responsible source or, when a request for proposal process is used, the highest-ranking offeror.
 - 2.4 Purchases from \$50,000 - \$100,000:** If the product meets the COTS criteria or is considered a construction type purchase, it is necessary to obtain three bona fide bids. It is not necessary to advertise in SCBO. For all other purchases, the Procurement Department must process a solicitation for advertisement in SCBO.
 - 2.5 Protest Rights.** The provisions of Section 11-35-4210 shall not apply to contracts awarded under the procedures set forth in sections 2.1, 2.2, and 2.3.

3 Purchases over \$100,000 to College's Certification Limits:

3.1. Methods of Source Selections

Unless otherwise provided by law, all state contracts must be awarded by competitive sealed bidding, pursuant to Section 11-35-1520, except as provided in:

- (1) Section 11-35-1250 (Authority to Contract for Auditing Services);
- (2) Section 11-35-1260 (Authority to Contract for Legal Services);
- (3) Section 11-35-1525 (Fixed Priced Bidding);
- (4) Section 11-35-1528 (Competitive Best Value Bidding);
- (5) Section 11-35-1529 (Competitive Online Bidding);
- (6) Section 11-35-1530 (Competitive Sealed Proposals);
- (7) Section 11-35-1535 (Competitive Negotiations);
- (8) Section 11-35-1540 (Negotiations After Unsuccessful Competitive Sealed Bidding);
- (9) Section 11-35-1550 (Small Purchases);
- (10) Section 11-35-1560 (Sole Source Procurements);
- (11) Section 11-35-1570 (Emergency Procurements);
- (12) Section 11-35-1575 (Participation in Auction or Bankruptcy Sale);
- (14) Section 11-35-3015 (Source Selection Methods Assigned to Project Delivery Methods);
- (15) Section 11-35-3220 (Architect Engineer, Construction Management and Land Surveying Services Procurement Procedures); and
- (16) Section 11-35-3230 (Exception for Small Architect-Engineer and Land Surveying Services contracts).

3.2 Competitive Sealed Bidding.

- (1) Condition for Use. Contracts must be awarded by competitive sealed bidding except as otherwise provided in Section 11-35-1510.
- (2) Invitation for Bids. An invitation for bids must be issued in an efficient and economical manner and must include specifications and all contractual terms and conditions applicable to the procurement.
- (3) Notice. Adequate notice of the invitation for bids must be given at a reasonable time before the date set forth in it for the opening of bids. The notice must include publications in "South Carolina Business Opportunities". Governmental bodies may charge vendors the cost incurred for copying and mailing bid or proposal documents requested in response to a procurement.
- (4) Receipt and Safeguarding of Bids. All bids, including modifications, received before the time of opening must be kept secure and unopened, except as provided by regulation of the board.
- (5) Bid Opening. Bids must be opened publicly in the presence of one or more witnesses, at the time and place designated in the invitation for bids and in the manner prescribed by regulation of the board. The amount of each bid, and other relevant information as may be specified by regulation, together with the name of each bidder, must be tabulated. The tabulation must be open to public inspection at that time.
- (6) Bid Acceptance and Bid Evaluation. Bids must be accepted unconditionally without alteration or correction, except as otherwise authorized in this code. The invitation for bids must set forth the evaluation criteria to be used. Criteria must not be used in bid evaluation that are not in the invitation for bids. Bids must be evaluated based on the requirements in the invitation for bids and in accordance with the regulations of the board.

(7) Correction or Withdrawal of Bids; Cancellation of Awards. Correction or withdrawal of inadvertently erroneous bids before or after award, or cancellation and re-award of awards or contracts, after award but before performance, may be permitted in accordance with regulations promulgated by the board. After bid opening, changes in bid prices or other provisions of bids prejudicial to the interest of the State or fair competition must not be permitted. After opening, bids must not be corrected or withdrawn except in accordance with the provisions of this code and the regulations promulgated pursuant to it. Except as otherwise provided by regulation, all decisions to permit the correction or withdrawal of bids, or to cancel awards or contracts, after award but before performance, must be supported by a written determination of appropriateness made by the chief procurement officers or head of a purchasing agency.

(8) Reserved.

(9) Tie Bids. If two or more bidders are tied in price while otherwise meeting all of the required conditions, awards are determined in the following order of priority:

(a) If there is a South Carolina firm tied with an out-of-state firm, the award must be made automatically to the South Carolina firm.

(b) Tie bids involving South Carolina produced or manufactured products, when known, and items produced or manufactured out of the State must be resolved in favor of the South Carolina commodity.

(c) Tie bids involving a business certified by the South Carolina Office of Small and Minority Business Assistance as a Minority Business Enterprise must be resolved in favor of the Minority Business Enterprise.

(d) Tie bids involving South Carolina firms must be resolved in favor of the South Carolina firm located in the same taxing jurisdiction as the governmental body's consuming location.

(e) In all other situations in which bids are tied, the award must be made to the tied bidder offering the quickest delivery time, or if the tied bidders have offered the same delivery time, the tie must be resolved by the flip of a coin witnessed by the procurement officer. All responding vendors must be invited to attend.

(10) Award. Unless there is a compelling reason to reject bids as prescribed by regulation of the board, notice of an award or an intended award of a contract to the lowest responsive and responsible bidders whose bid meets the requirements set forth in the invitation for bids must be given by posting the notice on the date and at a location specified in the invitation for bids. For contracts with a total or potential value in excess of one hundred thousand dollars, notice of an intended award of a contract must be given by posting the notice for seven business days before entering into a contract and must be sent electronically to all bidders responding to the solicitation on the same day that the notice is posted in accordance with this section. The posting date shall appear on the face of all these notices. If a change to the posting date is necessary, notice of the revised posting date must be given by posting the notice for three business days at the location identified in the solicitation and must be sent electronically to all bidders responding to the solicitation on the same day that the notice is posted in accordance with this section. The invitation for bids and a notice of award or notice of intent to award must contain a statement of a bidder's right to protest pursuant to Section 11-35-4210(1). When only one response is received, the notice of intent to award and the delay of award may be waived.

3.3 Request for Qualifications

(a) Before soliciting bids, the procurement officer, may issue a request for qualifications from prospective bidders. The request must contain, at a minimum, a description of the scope of work to be solicited by the invitation for bids, the deadline for submission of information, and how prospective bidders may apply for consideration. The request must require information concerning the prospective bidders' product specifications, qualifications, experience, and ability to perform the requirements of the contract. Adequate public notice of the request for qualifications must be given in the manner provided in Section 11-35-1520(3).

(b) After receipt of the responses to the request for qualifications from prospective bidders, the rank of the prospective bidders must be determined in writing from most qualified to least qualified on the basis of the information provided. Bids then must be solicited from at least the top two prospective bidders by means of an invitation for bids. The determination regarding how many bids to solicit is not subject to review under Article 17.

(1) Minor Informalities and Irregularities in Bids. A minor informality or irregularity is one which is merely a matter of form or is some immaterial variation from the exact requirements of the invitation for bids having no effect or merely a trivial or negligible effect on total bid price, quality, quantity, or delivery of the supplies or performance of the contract, and the correction or waiver of which would not be prejudicial to bidders. The procurement officer shall either give the bidder an opportunity to cure any deficiency resulting from a minor informality or irregularity in a bid or waive any such deficiency when it is to the advantage of the State. Such communication or determination shall be in writing. Examples of minor informalities or irregularities include, but are not limited to:

(a) failure of a bidder to return the number of copies of signed bids required by the solicitation;

(b) failure of a bidder to furnish the required information concerning the number of the bidder's employees or failure to make a representation concerning its size;

(c) failure of a bidder to sign its bid, but only if the firm submitting the bid has formally adopted or authorized the execution of documents by typewritten, printed, or rubber stamped signature and submits evidence of that authorization, and the bid carries that signature or the unsigned bid is accompanied by other material indicating the bidder's intention to be bound by the unsigned document, such as the submission of a bid guarantee with the bid or a letter signed by the bidder with the bid referring to and identifying the bid itself;

(d) failure of a bidder to acknowledge receipt of an amendment to a solicitation, but only if:

(i) the bid received indicates in some way that the bidder received the amendment, such as where the amendment added another item to the solicitation and the bidder submitted a bid, on it, if the bidder states under oath that it received the amendment before bidding and that the bidder will stand by its bid price; or

(ii) the amendment has no effect on price or quantity or merely a trivial or negligible effect on quality or delivery, and is not prejudicial to bidders, such as an amendment correcting a typographical mistake in the name of the governmental body;

(e) failure of a bidder to furnish an affidavit concerning affiliates;

(f) failure of a bidder to execute the certifications with respect to equal opportunity and affirmative action programs;

(g) failure of a bidder to furnish cut sheets or product literature;

(h) failure of a bidder to furnish certificates of insurance;

(i) failure of a bidder to furnish financial statements;

- (j) failure of a bidder to furnish references;
- (k) failure of a bidder to furnish its bidder number; and
- (l) notwithstanding Title 40, the failure of a bidder to indicate his contractor's license number or other evidence of licensure, except that a contract must not be awarded to the bidder unless and until the bidder is properly licensed under the laws of South Carolina.

3.4 Resident Vendor Preference

(A) For purposes of this section:

- (1) "End product" means the tangible product described in the solicitation including all component parts and in final form and ready for the state's intended use.
 - (2) "Grown" means to produce, cultivate, raise, or harvest timber, agricultural produce, or livestock on the land, or to cultivate, raise, catch, or harvest products or food from the water which results in an end product that is locally derived from the product cultivated, raised, caught, or harvested.
 - (3) "Labor cost" means salary and fringe benefits.
 - (4) "Made" means to assemble, fabricate, or process component parts into an end product, the value of which, assembly, fabrication, or processing is a substantial portion of the price of the end product.
 - (5) "Manufactured" means to make or process raw materials into an end product.
 - (6) "Office" means a nonmobile place for the regular transaction of business or performance of a particular service which has been operated as such by the bidder for at least one year before the bid opening and during that year the place has been staffed for at least fifty weeks by at least two employees for at least thirty-five hours a week each.
 - (7) "Services" means services as defined by Section 11-35-310(29) and also includes services as defined in Section 11-35-310(1)(d).
 - (8) "South Carolina end product" means an end product made, manufactured, or grown in South Carolina.
 - (9) "United States end product" means an end product made, manufactured, or grown in the United States of America.
- (B)(1) When evaluating pricing for purposes of making an award determination, the procurement officer shall decrease by seven percent the price of any offer for a South Carolina end product.
- (2) When evaluating pricing for purposes of making an award determination, the procurement officer shall decrease by two percent the price of any offer for a United States end product. This preference does not apply to an item to which the South Carolina end product preference has been applied.
 - (3) Whether award is to be made by item or lot, the preferences must be applied to the price of each line item of end product. A preference must not be applied to an item for which a bidder does not qualify.
 - (4) If a contract is awarded to a bidder that received the award as a result of the South Carolina end product or United States end product preference, the contractor may not substitute a nonqualifying end product for a qualified end product. A substitution in violation of this item is grounds for debarment pursuant to Section 11-35-4220. If a contractor violates this provision, the State may terminate the contract for cause and, in addition, the contractor

shall pay to the State an amount equal to twice the difference between the price paid by the State and the bidder's evaluated price for a substituted item.

(5) If a bidder is requesting this preference, the bidder, upon request of the procurement officer, must provide documentation that establishes the bidder's qualifications for the preference. Bidder's failure to provide this information promptly is grounds to deny the preference and for enforcement pursuant to subsection (E)(6).

(C)(1) When evaluating pricing for purposes of making an award determination, the procurement officer shall decrease a bidder's price by seven percent if the bidder maintains an office in this State and either (i) maintains at a location in South Carolina at the time of the bid an inventory of expendable items which are representative of the general type of commodities on which the award will be made and which have a minimum total value, based on the bid price, equal to the lesser of fifty thousand dollars or the annual amount of the contract; (ii) is a manufacturer headquartered and having an annual payroll of at least one million dollars in South Carolina and the end product is made or processed from raw materials into a finished end product by that manufacturer or its affiliate (as defined in Section 1563 of the Internal Revenue Code); or (iii) at the time of bidding, directly employs or has a documented commitment with individuals domiciled in South Carolina that will perform services expressly required by the solicitation and the total direct labor cost to bidder for those individuals to provide those services exceeds fifty percent of the bidder's total bid price.

(2) Whether award is to be made by item or lot, the preferences must be applied to the price of each line item of end product or work, as applicable. A preference must not be applied to an item for which a bidder does not qualify.

(3) If a bidder is requesting this preference, the bidder, upon request by the procurement officer, must provide documentation that establishes the bidder's qualifications for the preference and, for the preference claimed pursuant to subsection (C)(1)(iii), must identify the persons domiciled in South Carolina that will perform the services involved in the procurement upon which bidder relies in qualifying for the preference, the services those individuals are to perform, and documentation of the bidder's labor cost for each person identified. Bidder's failure to provide this information promptly is grounds to deny the preference and for enforcement under subsection (E)(6) below.

(D)(1) When evaluating pricing for purposes of making an award determination, the procurement officer shall decrease a bidder's price by two percent if:

(a) the bidder has a documented commitment from a single proposed first-tier subcontractor to perform some portion of the services expressly required by the solicitation; and

(b) at the time of the bidding, the subcontractor directly employs or has a documented commitment with individuals domiciled in South Carolina that will perform services expressly required by the solicitation and the total direct labor cost to the subcontractor for those individuals to provide those services exceeds twenty percent of bidder's total bid price.

(2) When evaluating pricing for purposes of making an award determination, the procurement officer shall decrease a bidder's price by four percent if:

(a) the bidder has a documented commitment from a single proposed first-tier subcontractor to perform some portion of the services expressly required by the solicitation; and

(b) at the time of the bidding, the subcontractor directly employs or has a documented commitment with individuals domiciled in South Carolina that will perform services expressly required by the solicitation and the

total direct labor cost to the subcontractor for those individuals to provide those services exceeds forty percent of bidder's total bid price.

(3) Whether award is to be made by item or lot, the preferences must be applied to the price of each line item of work. A preference must not be applied to an item for which a bidder does not qualify.

(4) Subject to other limits in this section, an offeror may benefit from applying for more than one of, or from multiple applications of, the preferences allowed by items (1) and (2).

(5)(a) In its bid, a bidder requesting any of the preferences allowed by items (1) and (2) must identify the subcontractor to perform the work, the work the subcontractor is to perform, and the bidder's factual basis for concluding that the subcontractor's work constitutes the required percentage of the work to be performed in the procurement.

(b) If a bidder is requesting a preference allowed by items (1) or (2), upon request by the procurement officer, the bidder shall identify the persons domiciled in South Carolina that are to perform the services involved in the procurement upon which the bidder relies in qualifying for the preference, the services those individuals are to perform, the employer of those persons, the bidder's relationship with the employer, and documentation of the subcontractor's labor cost for each person identified. Bidder's failure to provide this information promptly will be grounds to deny the preference and for enforcement pursuant to subsection (E)(6) below.

(c) If a contract is awarded to a bidder that received the award as a result of a preference allowed by items (1) or (2), the contractor may not substitute any business for the subcontractor on which the bidder relied to qualify for the preference, unless first approved in writing by the procurement officer. A substitution in violation of this subitem is grounds for debarment pursuant to Section 11-35-4220. If a contractor violates this provision, the procurement officer may terminate the contract for cause. If the contract is not terminated, the procurement officer may require the contractor to pay the State an amount equal to twice the difference between the price paid by the State and the price offered by the next lowest bidder, unless the substituted subcontractor qualifies for the preference.

(E)(1) A business is not entitled to any preferences unless the business, to the extent required by law, has:

(a) paid all taxes assessed by the State; and

(b) registered with the South Carolina Secretary of State and the South Carolina Department of Revenue.

(2) The preferences provided in subsections (B) and (C)(1)(i) and (ii) do not apply to a single unit of an item with a price in excess of fifty thousand dollars or a single award with a total potential value in excess of five hundred thousand dollars.

(3) The preferences provided in subsections (C)(1)(iii) and (D) do not apply to a bid for an item of work by the bidder if the annual price of the bidder's work exceeds fifty thousand dollars or the total potential price of the bidder's work exceeds five hundred thousand dollars.

(4) A solicitation must provide potential bidders an opportunity to request the preferences that apply to a procurement. By submitting a bid and requesting that a preference be applied to that bid, a business certifies that its bid qualifies for the preference for that procurement. For purposes of applying this section, a bidder is not qualified for a preference unless the bidder makes a request for the preference as required in the solicitation. If a solicitation specifies which preferences, if any, apply to a procurement, the applicability of preferences to that procurement is conclusively determined by the solicitation unless the solicitation document is timely protested as provided in Section 11-35-4210. If two or more bidders are tied after the application of the preferences allowed by this section, the tie must be resolved as provided in Section 11-35-1520(9). Price adjustments required by this section for purposes of evaluation and application of the preferences do not change the actual price offered by the

bidder.

(5) This section does not apply to an acquisition of motor vehicles as defined in Section 56-15-10 or an acquisition of supplies or services relating to construction. This section does not apply to a procurement conducted pursuant to Section 11-35-1550(2)(a) or (b), Section 11-35-1530, or Article 9, Chapter 35.

(6) Pursuant to Section 11-35-4220, a business may be debarred if (i) the business certified that it qualified for a preference, (ii) the business is not qualified for the preference claimed, and (iii) the certification was made in bad faith or under false pretenses. If a contractor has invalidly certified that a preference is applicable, the chief procurement officer may terminate the contract for cause, and the chief procurement officer may require the contractor to pay the State an amount equal to twice the difference between the price paid by the State and the price offered by the next lowest bidder.

(7) The sum of all preferences allowed by items (D)(1) and (D)(2), when applied to the price of a line item of work, may not exceed six percent unless the bidder maintains an office in this State. Under no circumstances may the cumulative preferences applied to the price of a line item exceed ten percent.

(8) As used in items (C)(1)(iii), (D)(1)(b), and (D)(2)(b), the term "documented commitment" means a written commitment by the bidder to employ directly an individual, and by the individual to be employed by the bidder, both contingent on the bidder receiving the award.

3.5 Competitive Fixed Price Bidding

- (1) **Conditions for Use.** When the college determines in writing that the use of competitive sealed bidding is either not practicable or not advantageous to the college, a contract may be entered into by competitive fixed price bidding subject to the provisions of Section 11-35-1520 and the ensuing regulations, unless otherwise provided for in this section.
- (2) **Fixed price Bidding.** The purpose of fixed price bidding is to provide multiple sources of supply for specific goods or services based on a pre-set maximum price, which the State will pay for such goods or services.
- (3) **Public Notice.** Adequate public notice of the solicitation shall be given in the same manner as provided in Section 11-35-1520(3).
- (4) **Pricing.** The College shall establish, prior to issuance of the fixed price bid, a maximum amount the College will pay for the goods or services desired.
- (5) **Evaluation.** Vendors' responses to the fixed price bid will be reviewed to determine if they are responsive and responsible.
- (6) **Discussion with Responsive Bidders.** Discussions may be conducted with apparent responsive bidders to assure understanding of the requirements of the fixed price bid. All bidders, whose bids, in the procuring agency's sole judgment, need clarification shall be accorded such an opportunity.
- (7) **Award must be made to all responsive and responsible bidders to the college's request for competitive fixed price bidding.** The contract file shall contain the basis on which the award is made and must be sufficient to satisfy external audit.
- (8) **Bids Received after Award.** Bidders not responding to the initial fixed price bid may be added to the awarded vendors list provided the bidder furnishes evidence of responsibility and responsiveness to the college's original fixed price bid as authorized by the solicitation.
- (9) **Remedies.** The failure of a specific offeror to receive business, once it has been added to the awarded vendor's list, shall not be grounds for a contract controversy under Section 11-35-4230.

Correction Creates Low Bid: To maintain the integrity of the competitive sealed bidding system, a bidder shall not be permitted to correct a bid mistake after bid opening that would cause such bidder to have the low bid unless the mistake, in the judgment of the Procurement Manager, is clearly evident from examining the bid

document; for example, extension of unit prices or errors in addition.

3.6 Competitive Best Value Bidding

- (1) **Conditions for Use.** When the college determines in writing that the use of competitive sealed bidding is either not practical or not advantageous to the College, a contract may be entered into by competitive best value bidding subject to the provisions of Section 11-35-1520 and the ensuing regulations, unless otherwise provided for in this section.
- (2) **Best Value Bidding.** The purpose of best value bidding is to allow factors other than price to be considered in the determination of award for specific goods or services based on pre-determined criteria identified by the college.
- (3) **Public Notice.** Adequate public notice of the request for the solicitation shall be given in the same manner as provided in Section 11-35-1520(3).
- (4) **Bid Opening.** At the time of the bid opening, the only information released will be the participating vendors. Cost information will be provided after the ranking of bidders and the issuance of award.
- (5) **Evaluation Factors.** The best value bid shall state the factors to be used in determination of award and the numerical weighting for each factor. Cost must be a factor in determining the award and cannot be weighted as less than sixty percent. Best value bid evaluation factors may be defined to include, but are not limited to, any of the following as determined by the college in its sole discretion and not subject to protest:
 - (a) Operational costs that the College would incur if the bid is accepted;
 - (b) Quality of the product or service, or its technical competency;
 - (c) Reliability of delivery and implementation schedules;
 - (d) Maximum facilitation of data exchange and systems integration;
 - (e) Warranties, guarantees, and return policy;
 - (f) Vendor financial stability;
 - (g) Consistency of the proposed solution with the college's planning documents and announced strategic program direction;
 - (h) Quality and effectiveness of business solution and approach;
 - (i) Industry and program experience;
 - (j) Prior record of vendor performance;
 - (k) Vendor expertise with engagement of similar scope and complexity;
 - (l) Extent and quality of the proposed participation and acceptance by all user groups;
 - (m) Proven development methodologies and tools; and
 - (n) Innovative use of current technologies and quality results.
- (6) **Discussion with Responsive Bidders.** Discussions may be conducted with apparent responsive bidders to assure understanding of the best value bid. All bidders, in the college's sole judgment, need clarification shall be afforded such an opportunity.
- (7) **Selection and Ranking.** Bids shall be evaluated by using only the criteria stated in the best value bid and by adhering to the weighting as assigned. All evaluation factors, other than cost, will be considered prior to determining the effect of cost on the score for each participating bidder. Once the evaluation is complete, all responsive bidders shall be ranked from most advantageous to least advantageous to the College, considering only the evaluation factors stated in the best value bid.
- (8) **Award.** Award must be made to the responsive and responsible bidder whose bid is determined, in writing, to be most advantageous to the College, taking into consideration all evaluation factors set forth in the best value bid. The contract file shall contain the basis on which the award is made and must be sufficient to satisfy external audit.

3.7 Competitive Sealed Proposal

- (1) **Conditions for Use.** When the College determines in writing that the use of competitive sealed bidding is either not practicable or not advantageous to the College, a contract may be entered into

by competitive sealed proposals subject to the provisions of Section 11-35-1520 and the regulations, unless otherwise provided for in this section. Subject to the requirements of Section 11-35-3220, the board may provide by regulation that it is either not practicable or not advantageous to the College to procure specified types of supplies, services, or construction by competitive sealed bidding.

- (2) Public Notice. Adequate public notice shall be given in the same manner as provided in Section 11-35-1520 (3) for the request for proposals.
- (3) Receipt of Proposals. Proposals shall be opened publicly in accordance with regulations of the board. A tabulation of proposals shall be prepared in accordance with regulations promulgated by the board and shall be open for public inspection after contract award.
- (4) Request for Qualifications. Prior to soliciting proposals, the college acting through the authorized Procurement Manager, may issue a request for qualifications from prospective offerors. Such request shall contain at a minimum a description of the goods or services to be solicited by the RFP and the general scope of the work and shall state the deadline for submission of information and how prospective offers may apply for consideration. The request shall require information only on their qualifications, experience, and ability to perform the requirements of the contract. After receipt of the responses for qualifications, the perspective offerors shall be ranked from most qualified to least qualified on the basis of the information provided. Proposals shall then be solicited from at least the top two prospective offerors by means of an RFP. The failure of a prospective offeror to be selected to receive the request for proposals shall not be grounds for protest under Section 11-35-4210.
- (5) Evaluation Factors. The RFP shall state the relative importance of the factors to be considered in evaluating proposals but shall not require numerical weighting for each factor. Price may but need not be an evaluation factor.
- (6) Discussion with Offerors. As provided in the RFP, discussions may be conducted with apparent responsive offerors for the purpose of clarification.
- (7) Selection and Ranking. Proposals shall be evaluated using on the criteria stated in the RFP and must be adherence to the weightings previously assigned. Once evaluation is complete, all responsive offerors shall be ranked from most advantageous to least advantageous to the college, considering only the evaluation factors stated in the RFP. If price is an initial factor, award shall be made in accordance with Section 11-35-1530(9) below.
- (8) Negotiations. Whether price was an evaluation factor or not, the college, through the appropriate procurement official, may, in its sole discretion and not subject to challenge through a protest filed under Section 11-35-4210, proceed in any of the manners listed below:
 - (a) negotiate price with the highest ranked offeror. If a satisfactory price cannot be agreed upon, price negotiations may be conducted, in the sole discretion of the procuring agency, with the second, and then the third, etc.
 - (b) negotiate with the highest ranking offeror on matters affecting the scope of the contract, so long as the overall nature and intent of the contract is not changed. If a satisfactory contract cannot be negotiated with the highest-ranking offeror, negotiations may be conducted, in the sole discretion of the college with the second, third, etc.
 - (c) during the negotiation process as outlined above in (a) and (b), if the college is unsuccessful in its first round of negotiations, it may reopen negotiations with any offeror with whom it previously negotiated.
- (d) If, after following the procedures set forth in Section 11-35-1530(8), a contract is not able to be negotiated, the scope of the RFP may be changed in an effort to reduce the cost to a fair and reasonable amount, and all responsive offerors must be allowed to submit their best and final offers. In conducting negotiations, there must be no disclosure of any confidential information derived from proposals and negotiations submitted by competing offerors.
- (9) Award must be made to the responsive offeror whose proposal is determined in writing to be the most

advantageous to the college, taking into consideration price and the evaluation factors set forth in the RFP, unless the college determines to utilize one of the options provided in Section 11-35-1530(8). The contract file shall contain the basis on which the award is made and must be sufficient to satisfy external audit. Procedures and requirements for the notification of intent to award the contract shall be the same as those stated in Section 11-35-1520(10)

3.8 Competitive Negotiations

(A) Conditions for Use.

(1) Competitive negotiations are most appropriate for complex, major acquisitions.

(2) If the procurement officer determines in writing that the use of competitive negotiations is appropriate and in the using agency's interest, a contract may be entered into by competitive negotiations subject to the provisions of Section 11-35-1520 and the ensuing regulations, unless otherwise provided in this section. This section may not be used to acquire only commercially available off-the-shelf products.

(3) Competitive negotiated acquisitions may be conducted only by the office of the appropriate chief procurement officer.

(B) Definitions. As used in this section:

(1) "Clarification" means any communication in which the procurement officer requests or accepts information that clarifies any information in a proposal. Clarification does not include the request or acceptance of any change to the terms of a contractual offer.

(2) "Competitive range" means the offeror or group of offerors selected for negotiation.

(3) "Negotiations" means any communication that invites or permits an offeror to change the terms of its contractual offer in any way.

(C) Request for qualifications. Offerors may be prequalified as provided in Section 11-35-1530(4).

(D) Requests for proposals.

(1)(a) Solicitations for competitive negotiations must be requests for proposals and must, at a minimum, describe:

(i) the state's requirements;

(ii) anticipated terms and conditions that will apply to the contract. The solicitation may authorize offerors to propose alternative terms and conditions, including alternative contract line items;

(iii) information required to be in the offerors proposal; and

(iv) evaluation factors.

(b) The request for proposals must state the relative importance of all factors to be considered in evaluating proposals but need not state a numerical weighting for each factor. Except as provided by regulation, past performance and price must be evaluated. If price is an evaluation factor, the solicitation must state whether all evaluation factors other than price, when combined, are significantly more important than, approximately equal to,

or significantly less important than price.

(2) Amendments. Amendments issued after the established time and date for receipt of proposals may not exceed the general scope of the request for proposals and must be issued to those offerors that have not been eliminated from the competition.

(E) Public Notice. Adequate public notice of the request for proposals must be given in the same manner as provided in Section 11-35-1520(3).

(F) Receipt of Proposals. Proposals must be opened in accordance with regulations of the board. A tabulation of proposals must be prepared in accordance with regulations promulgated by the board and must be open for public inspection after contract award.

(G) Evaluation. Proposal evaluation is an assessment of the proposal and the offeror's ability to perform the prospective contract successfully. All proposals must be evaluated and, after evaluation, their relative qualities must be assessed solely on the factors and subfactors specified in the solicitation. The relative strengths, deficiencies, significant weaknesses, and risks supporting proposal evaluation must be documented in the contract file.

(H) Competitive Range. After complying with subsection (G), the procurement officer shall establish a competitive range comprised of the offerors that submitted the most promising offers. Ordinarily, the competitive range should not include more than three offerors. The procurement officer may select only one offeror and may select more than three. The procurement officer shall document the rationale for the selections.

(I) Exchanges with Offerors.

(1) Fairness and impartiality. The procurement officer shall treat all offerors fairly and impartially when deciding whether and when to seek clarification or to negotiate. Similarly situated offerors must be given similar opportunities to clarify and, if in the competitive range, to negotiate.

(2) Clarifications. The procurement officer may conduct clarifications at any time before the award decision.

(3) Negotiations.

(a) The procurement officer shall negotiate with each offeror in the competitive range. The primary objective is to maximize the state's ability to obtain best value, based on the requirements and the evaluation factors set forth in the solicitation. Subject to item (1), the scope and extent of negotiations are a matter of the procurement officer's judgement.

(b)(i) At a minimum, the procurement officer shall identify and seek the elimination of any term of a contractual offer that does not conform to a material requirement of a solicitation and any other undesirable terms in a contractual offer.

(ii) The procurement officer may negotiate with offerors to seek changes in their contractual offers that the State desires and to allow them to make other improvements.

(iii) Negotiations may include pricing.

(iv) The procurement officer may not relax or change any material term of the solicitation during negotiation except by amendment.

- (v) In conducting negotiations, the procurement officer may not disclose confidential information derived from proposals submitted by competing offerors.
- (c) The procurement officer shall document the using agency's prenegotiation objectives with regard to each offeror in the competitive range and shall prepare a record of each negotiation session.
- (d) The procurement officer may eliminate an offeror from the competitive range after negotiation if the offeror is no longer considered to be among the most promising.
- (4) The board must promulgate regulations governing exchanges with offerors.
- (J) Proposal Revisions. The procurement officer may request or allow proposal revisions to clarify and document understandings reached during negotiations. If an offeror's proposal is eliminated or otherwise removed from the competitive range, no further revisions to that offeror's proposal may be accepted or considered. Upon the completion of negotiations, the contracting officer shall request that offerors still in the competitive range submit final proposals no later than a specified common cutoff date and time.
- (K) Award.
- (1) Award must be based on a comparative assessment of final proposals from offerors within the competitive range against all source selection criteria in the solicitation. Award must be made to the responsible offeror whose final proposal meets the announced requirements in all material respects and is determined in writing to provide the best value to the State, taking into consideration the evaluation factors set forth in the request for proposals and, if price is an evaluation factor, any tradeoffs among price and non-price factors. As provided by regulation, the contract file must document the basis on which the award is made, and the documentation must explain and justify the rationale for any business judgments and tradeoffs made or relied on in the award determination, including benefits associated with additional costs. Section 11-35-1524 does not apply.
- (2) Procedures and requirements for the notification of intent to award the contract must be the same as those provided in Section 11-35-1520(1).

3.9 Sole Source Procurement

- (A) A contract may be awarded for a supply, service, information technology, or construction item without competition if, under regulations promulgated by the board, the chief procurement officer, the head of a purchasing agency, or a designee of either officer, above the level of the procurement officer, determines in writing that there is only one source for the required supply, service, information technology, or construction item. Except for contracts with a total potential value of fifty thousand dollars or less, adequate public notice of the intent to award without competition must be posted in South Carolina Business Opportunities, except that public notice is not required if the appropriate chief procurement officer, after consultation with the head of the purchasing agency, determines in writing that award without such notice is in the interest of the State. Notice must contain a statement of the right to protest under Section 11-35-4210(1) and must be posted at least five business days before entering a contract. For contracts with a total potential value greater than two hundred fifty thousand dollars, such notice must be posted at least ten business days before entering a contract.
- (B) Written documentation must include the determination and basis for the proposed sole source procurement. A delegation of authority by either the chief procurement officer or the head of a governmental body with respect to sole source determinations must be submitted in writing to the

Materials Management Officer. In cases of reasonable doubt, competition must be solicited. Any decision by a governmental body that a procurement be restricted to one potential vendor must be accompanied by a thorough, detailed explanation as to why no other will be suitable or acceptable to meet the need. **See Attachment #3**

(C) A violation of these regulations by a purchasing agency, upon recommendation of the Division of Procurement Services with approval of the majority of the board, must result in the temporary suspension, not to exceed one year, of the violating governmental body's ability to procure supplies, services, information technology, or construction items pursuant to this section.

3.10 Emergency Procurements

The President of the College or Vice President for Finance and Administration may make or authorize others to make emergency procurements only when there exists an immediate threat to public health, welfare, critical economy and efficiency, or safety under emergency conditions as defined in the regulations and provided, that such emergency procurements shall be made with as much competition as is practicable under the circumstances. A written determination of the basis for the emergency and for the selection of the particular contractor shall be included in the contract file. **See Attachment #4**

3.11 Participation in Auction or Sale of Supplies from Bankruptcy

A governmental body having knowledge of either an auction or a sale of supplies from a bankruptcy may elect to participate. The governmental body shall (a) survey the needed items being offered to ascertain their condition and usefulness, (b) determine a fair market value for new like items through informal quotes, (c) determine the fair market value from similar items considering age and useful life, and (d) estimated repair cost and delivery cost, if any, of the desired items. Using this information, the governmental body shall determine the maximum price that it can pay for each item desired. At the auction or sale, the governmental body shall not exceed the maximum price so determined.

4.0 Information Technology Procurements

(1) The department for Information Technology shall be responsible for:

- (a) assessing the needs for and use of information technology within the College;
- (b) Work closely with the Procurement Office in procuring all supplies and services required by the college to support its IT needs;
- (c) Work with the Inventory Control Manager in providing for the disposal of all information technology property surplus to the needs of a using agency;
- (d) developing policies and standards for the management of information technology in state government;
- (e) initiating a College plan for the management and use of information technology;
- (f) providing management and technical assistance to the capital construction committee focusing on IT plans and designs.

5.0 Cancellation of IFB's or RFP's

Any solicitation under the Procurement Code may be canceled, or any or all bids or proposals may be rejected in whole or part as may be specified in the solicitation, when it is in the best interest of the College. The reasons for rejection, supported with documentation sufficient to satisfy external audit, shall be made a part of the contract file.

6.0 Responsibility of Bidders and Offerors

- (1) **Determination of Responsibility.** Responsibility of the bidder or offeror shall be ascertained for each contract let by the State based upon full disclosure to the procurement officer concerning capacity to meet the terms of the contracts and based upon past record of performance for similar contracts. The board shall by regulation establish standards of responsibility that shall be enforced in all state contracts.
- (2) **Determination of Nonresponsibility.** A written determination of nonresponsibility of a bidder or offeror shall be made in accordance with regulations promulgated by the board. The unreasonable failure of a bidder or offeror to supply information promptly in connection with an inquiry with respect to responsibility may be grounds for a determination of nonresponsibility with respect to such bidder or offeror.
- (3) **Right of Nondisclosure.** Except as otherwise provided by law, information furnished by a bidder or offeror pursuant to this section shall not be disclosed outside of the offices of the board, the Office of the Attorney General, the using agency, or the purchasing agency without prior written consent by the bidder or offeror.
- (4) **Public procurement units,** as defined in Section 11-35-4610, may provide information to one another relating to the responsibility or prior performance of a bidder or offeror, or provide any other information about a bidder or offeror that is otherwise related to procurement. Any person affiliated with a public procurement unit in an official capacity, who provides such information in good faith, is immune from civil and criminal liability which might otherwise result by reason of his actions. In all such civil or criminal proceedings, good faith is a rebuttable presumption.

7.0 Cost or Pricing Data

- (1) **Contractor Certification.** A contractor shall, except as provided in subsection (3) of this section, submit cost or pricing data and shall certify that, to the best of his knowledge and belief, the cost or pricing data submitted is accurate, complete, and current as of mutually determined specified date prior to the date of:
 - (a) the pricing of any contract awarded by competitive sealed proposals pursuant to Section 11-35-1530, by competitive negotiations pursuant to Section 11-35-1535, or pursuant to the sole source procurement authority as provided in Section 11-35-1560 where the total contract price exceeds an amount established by the board in regulations; or
 - (b) the pricing of any change order or contract modification which exceeds an amount established by the board in regulations.
- (2) **Price Adjustment.** Any contract, change order, or contract modification under which a certificate is required shall contain a provision that the price to the State, including profit or fee, shall be adjusted to

exclude any significant sums by which the State finds that such price was increased because the contractor furnished cost or pricing data was inaccurate, incomplete, or not current as of the date agreed upon between parties.

(3) Cost or Pricing Data Not Required. The requirements of this section shall not apply to contracts:

- (a) where the contract price is based on adequate price competition;
- (b) where the contract price is based on established catalog prices or market prices;
- (c) where contract prices are set by law or regulations;
- (d) where it is determined in writing in accordance with regulations promulgated by the board that the requirements of this section may be waived and the reasons for such waiver are stated in writing.

8.0 Effect of Contract or Amendment

A contract or amendment thereto, including, but not limited to, a change order or contract modification, is not effective against a governmental body unless the contract or amendment is in writing and signed by an officer having actual authority to bind the governmental body.

9.0 Multiterm Contracts

- (1) Specified Period. Unless otherwise provided by law, a contract for supplies, services, or information technology must not be entered into for any a period of more than one year unless approved in a manner prescribed by regulation of the board. The term of the contract and conditions of renewal or extension must be included in the solicitation and funds must be available for the first fiscal period at the time of contracting. Payment and performance obligations for succeeding fiscal periods must be subject to the availability and appropriation of funds for them.
- (2) Determination Prior to Use. Before the utilization of a multiterm contract, it must be determined in writing by the appropriate governmental body that:
 - (a) estimated requirements cover the period of the contract and are reasonably firm and continuing; and
 - (b) such a contract serves the interest of the State by encouraging effective competition or otherwise promoting economies in state procurement.
- (3) Cancellation Due to Unavailability of Funds in Succeeding Fiscal Periods. When funds are not appropriated or otherwise made available to support continuation of performance in a subsequent fiscal period, the contract must be canceled.
- (4) Maximum Duration. The maximum potential duration for a contract is five years. A maximum potential duration of up to seven years may be approved by the appropriate chief procurement officer.
- (5) Authority Approval. Every type of contract with a maximum potential duration exceeding seven years must be approved by the board. For competitive procurements, approval of the maximum potential duration must be granted before solicitation.

10.0 Material Changes Prohibited

A change order or a contract modification may not alter a contract in a manner or degree inconsistent with the underlying purposes and policies of this code or the regulations of the board.

11.0 Retention of Procurement Records

All procurement records of governmental bodies shall be retained and disposed of in accordance with records retention guidelines and schedules approved by the Department of Archives and History after consultation with the Attorney General. All retained documents shall be made available to the Attorney General or a designee upon request and proper receipt therefor.

12.0 Issuance of Specifications; Duties of the Board

The board shall promulgate regulations governing the preparation, maintenance, and content of specifications for supplies, services, information technology, and construction required by the State.

13.0 Assuring Competition

All specifications shall be drafted so as to assure cost effective procurement of the state's actual needs and shall not be unduly restrictive.

14.0 Qualifications Based Selection Procedures

(1) Agency Selection Committee. A governmental body shall establish its own architect-engineer, construction management, and land surveying services selection committee, referred to as the agency selection committee, which must be composed of those individuals the agency head determines to be qualified to make an informed decision as to the most competent and qualified firm for the proposed project. The head of the governmental body or his qualified responsible designee shall sit as a permanent member of the agency selection committee for the purpose of coordinating and accounting for the committee's work. To assist an agency selection committee in the selection of firms to be employed for significant or highly technical projects and to facilitate prompt selections, the agency selection committee may invite the State Engineer or his designee to sit as a nonvoting member of the committee.

(2)(a) Advertisement of Project Description. The agency selection committee is responsible for:

- (i) developing a description of the proposed project;
- (ii) enumerating all required professional services for that project; and
- (iii) preparing a formal invitation to firms for submission of information.

(b) The invitation must include, but not be limited to, the project title, the general scope of work, a description of all professional services required for that project, the submission deadline, and how interested firms may apply for consideration. The agency selection committee shall file a copy of the project description and the invitation with the State Engineer's Office. Adequate notice of the invitation must be given at a reasonable time before the date set

forth in it for receipt of responses. The invitation must be advertised formally in an official state government publication. The manner in which this official state government publication must be published, the content of the publication itself, the frequency of the publication, the method for subscription to the publication, and the manner by which the publication is distributed must be established by regulation of the board.

(3) Response to Invitation. The date for submission of information from interested persons or firms in response to an invitation must not be less than fifteen days after publication of the invitation. Interested architect-engineer, construction management, and land surveying persons or firms shall respond to the invitation with the submission of a current and accurate Federal Standard Form 330, Architect-Engineer and Related Services Questionnaire, or successor form or similar information as the State Engineer may specify in the Manual for Planning and Execution of State Permanent Improvement Projects, Part II, and other information that the particular invitation may require.

(4) Interviews with Interested Firms. Following receipt of information from all interested persons and firms, the agency selection committee shall hold interviews with at least three persons or firms who respond to the committee's advertisement and who are considered most qualified on the basis of information available before the interviews. A list of firms selected for interview must be sent to all firms that submitted information in response to the advertisement, before the date selected for the interviews. If less than three persons or firms respond to the advertisement, the committee shall hold interviews with those that did respond. The agency selection committee's determination as to which are to be interviewed must be in writing and based upon its review and evaluation of all submitted materials. The written report of the committee must list specifically the names of all persons and firms that responded to the advertisement and enumerate the reasons of the committee for selecting those to be interviewed. The purpose of the interviews is to provide the further information that may be required by the agency selection committee to fully acquaint itself with the relative qualifications of the several interested firms.

(5) Selection and Ranking of the Three Most Qualified.

(a) The agency selection committee shall evaluate each of the persons or firms interviewed in view of their:

(i) past performance;

(ii) the ability of professional personnel;

(iii) demonstrated ability to meet time and budget requirements;

(iv) location and knowledge of the locality of the project if the application of this criterion leaves an appropriate number of qualified firms, given the nature and size of the project;

(v) recent, current, and projected workloads of the firms;

(vi) creativity and insight related to the project;

(vii) related experience on similar projects;

(viii) volume of work awarded by the using agency to the person or firm during the previous five years, with the objective of effectuating an equitable distribution of contracts by the State among qualified firms including Minority Business Enterprises certified by the South Carolina Office of Small and Minority Business Assistance and firms that have not had previous state work; and

(ix) any other special qualification required pursuant to the solicitation of the using agency.

(b) Based upon these evaluations, the agency selection committee shall select the three persons or firms that, in its judgment, are the best qualified, ranking the three in priority order. The agency selection committee's report ranking the three chosen persons or firms must be in writing and include data substantiating its determinations.

(6) Notice of Selection and Ranking. When it is determined by the agency that the ranking report is final, written notification of the highest ranked person or firm must be sent immediately to all firms interviewed.

(7) Negotiation of Contract. The governing body of the governmental body or its designee shall negotiate a contract for services with the most qualified person or firm at a compensation that is fair and reasonable to the State. If the governing body of the governmental body or its designee is unable to negotiate a satisfactory contract with this person or firm, negotiations must be terminated formally. Negotiations must commence in the same manner with the second and then the third most qualified until a satisfactory contract is negotiated. If an agreement is not reached with one of the three, additional persons or firms in order of their competence and qualifications must be selected after consultation with the agency selection committee, and negotiations must be continued in the same manner until agreement is reached.

(8) State Engineer's Office Review. The head of the governmental body shall submit the following documents to the State Engineer's Office for its review:

(a) the written report of the agency selection committee, listing the persons or firms that responded to the invitation to submit information and enumerating the reasons of the committee for selecting the particular ones to be interviewed;

(b) the written ranking report of the agency selection committee and all data substantiating the determinations made in that report; and

(c) the tentative contract between the governmental body and the selected person or firm.

(9) Approval or Disagreement by State Engineer's Office. The State Engineer's Office has ten days to review the data submitted by the agency selection committee, and to determine its position with respect to the particular person or firm recommended for approval by the agency. If the State Engineer's Office disagrees with the proposal, it may contest the proposal by submitting the matter to the board for decision. In the event of approval, the State Engineer's Office shall notify immediately in writing the governmental body and the person or firm selected of the award and authorize the governmental body to execute a contract with the selected person or firm. In the event of disagreement, the State Engineer's Office immediately shall notify the governmental body in writing of its intention to contest the ranking and the reasons for it. All contract negotiations by the governing body must be suspended pending a decision by the board concerning a contested ranking. The board shall hear contests at its next regularly scheduled meeting after notification of the governmental body. If the board rules in support of the State Engineer's Office position, the governmental body shall submit the name of another person or firm to the State Engineer's Office for consideration, selected in accordance with the procedures prescribed in this section. If the board rules in support of the governmental body, the governmental body must be notified in writing and authorized to execute a contract with the selected person or firm.

15.0 SUPPLY MANAGEMENT

Management of Warehouse and Inventory

The Procurement Department of HGTC shall be responsible for the management of the warehouse and inventory. The Vice President for Finance and Academics shall be the final authority for this area. The

Equipment and Inventory Control position shall report to the Procurement Manager. The Asset Management Process manual shall be the official guidelines. **See attachment #5**

Regulations for Sale, Lease, Transfer and Disposal of Surplus Property

The board shall provide the guidelines for the sale, lease, or disposal of surplus supplies by public auction, competitive sealed bidding or other appropriate methods and the transfer of excess supplies between agencies and departments.

Allocation of Proceeds for Sale or Disposal of Surplus Supplies

Except as provided in Section 11-35-1580 and 11-35-3830 the sale of all state-owned supplies, property or personal property not in actual public use shall be conducted and directed by the Office of General Services. The sales shall be held at a time and place advantageous to the State. The College shall inventory and report all surplus personal property not in use to the Office within 180 days of the inventory date. The Office of General Services shall receive and deposit the proceeds from such sales in the state general fund.

Trade-In-Sales

(1) The College may trade-in-personal property the trade-in value of which may be applied to the procurement or lease of like items. The trade-in value of such personal property shall not exceed an amount as specified by the board.

(2) When the original unit cost of college property exceeds the specified amount, the board shall have the authority to determine if the property shall be traded in and the value applied to the purchase or new like items or shall be classified as surplus and sold in accordance with Section 11-35-3820.

(3) The College shall submit quarterly reports to the materials management officer a record listing all trade in sales.

Licensing for Public Sale of Certain Publications and Materials

The State Fiscal Accountability Authority may license for public sale publications, including South Carolina Business Opportunities, materials pertaining to training programs, and information technology products that are developed during the normal course of the board's activities. The items must be licensed at reasonable costs established in accordance with the cost of the items. All proceeds from the sale of the publications and materials must be placed in a revenue account and expended for the cost of providing the services

Sale of Unserviceable Supplies

Governmental bodies approved by the board may sell any supplies owned by it after the supplies have become entirely unserviceable and can properly be classified as "junk", in accordance with procedures established by the designated board office. All sales of unserviceable supplies by the governmental body must be made in public to the highest bidder, after advertising for fifteen days, and the funds from the sales must be credited to the account of the governmental body owning and disposing of the unserviceable supplies.

16.0 LEGAL AND CONTRACTUAL REMEDIES

In regard to Administrative Resolution of Legal and Contractual Controversies, the College shall adhere to the guidelines set forth in sections 11-35-4210, 11-35-4215, 11-35-4220 and 11-35-4230.

In regard to Contractual Remedies, the college shall adhere to the guidelines as set forth in sections 11-35-4310, 11-35-4320 and 11-35-4330

Procurement Review Panel

The Procurement Review Panel shall have the responsibility to review and determine disagreements arising from procurements. The decision of the Procurement Review Panel is final as to the administrative review and

may be appealed to the Circuit Court under the provisions of the South Carolina Administrative Procedures Act.

17.0 COOPERATIVE PURCHASING

Cooperative Purchasing Authorized

The College may participate in, sponsor, conduct, or administer a cooperative purchasing agreement for the procurement of supplies or services with another public procurement unit. A thirty-day notice of a proposed multi-state solicitation shall be provided through SCBO and such contracts may only be awarded to manufacturers who will be distributing the products to SC governmental bodies through SC vendors.

The College shall adhere to the guidelines as set forth in Section 11-35-4820 for Selective Mandatory Opting.

Sale, Acquisition, or Use of Supplies by a Public Procurement Unit

The College may sell to, acquire from, or use any supplies belonging to another public procurement unit or external procurement activity in accordance with the requirements of Articles 5 and 15 of this chapter; provided that such procurement shall take place only when the procuring entities have good reason to expect the intergovernmental procurement to be more cost effective than doing their own procurement.

Cooperative use of Supplies or Services

Any public procurement unit may enter into an agreement in accordance with the requirements of Articles 5 and 15 of this chapter with any other public procurement unit or external procurement activity for the cooperative use of supplies or services under the terms agreed upon between the parties; provided, that such cooperative use of supplies or services shall take place only when the public procurement units have good reason to expect the cooperative use to be more cost effective than utilizing their own supplies and services.

Joint Use of Facilities

Any public procurement unit may enter into agreements for the common use or lease of warehousing facilities, capital equipment, and other facilities with another public procurement unit or an external procurement activity under the terms agreed upon between the parties.

Supply of Personnel, Information and Technical Services

The College will adhere to the guidelines as set forth in this section.

Use of Payments Received by a Supply Public Procurement Unit

All payments from any public procurement unit or external procurement activity received by a public procurement unit supply personnel or services shall be governed by the provisions of law concerning non-budgeted revenue of the recipient entity.

Public Procurement Units in Compliance with Code Regulations

Where the public procurement unit or external procurement activity administering a cooperative purchase complies with the requirements of this Code, the college shall be deemed to have complied with this Code. The College shall not enter into a cooperative purchasing agreement for the purpose of circumventing this Code.

Review of Procurement Requirement

To the extent possible, the chief procurement officers may collect information concerning the type, cost, quality, and quantity of commonly used supplies, services, or construction being procured or used by local public procurement units, which shall be required to respond appropriately as a precondition for participation in state contracts as governed by regulations promulgated by the board. The chief procurement officers shall make available all such information to any public procurement unit upon request.

18.0 ASSISTANCE TO MINORITY BUSINESSES

The board has established regulations detailing definitions of the following terms using, in addition to the criteria set forth in this section, such criteria as it may deem desirable.

- (1) Minority Person – a US citizen who is economically and socially disadvantaged.
 - (a) Socially disadvantaged individuals – those individuals who have been subject to racial or ethnic prejudice or cultural bias because of their identification as members of a certain group without regard to their individual qualities. Such groups include but are not limited to, Black Americans, Hispanic Americans, Native Americans (to include American Indians, Eskimos, Aleuts and Native Hawaiians), Asian Pacific Americans and other minorities to be designated by the board.
 - (b) Economically disadvantaged individuals are those socially disadvantaged individuals whose ability to compete in a free enterprise system has been impaired due to diminished capital and credit opportunities as compared to others in the same business area that are not socially disadvantaged.
- (2) Socially and economically disadvantaged small business means any business which:
 - (a) Is at least 51% owned by one or more citizens of the US who are determined to be socially and economically disadvantaged?
 - (b) A corporation that is at least 51% of all classes of voting stock owned by socially and economically disadvantaged.
 - (c) A partnership that is 51% owned and managed by an individual or individuals determined to be socially and economically disadvantaged.

Statement of Policy and Its Implementation Regarding Minority Businesses

The SC General Assembly wishes to ensure that minority owned and operated businesses in the State are given the opportunity to participate in the overall procurement process and has set procedures that will result in awarding contracts and subcontracts to minority business firms in order to enhance minority capital ownership, overall state economic development and reduce dependency on the part of minorities. The Procurement Manager of Horry Georgetown Technical College shall implement the policy set forth in subsection (1) of this section in accordance with the provisions of Section 11-35-5220.

Duties of the Procurement Manager

- (1) Assistance from the Chief Procurement Officers. The chief procurement officers shall provide appropriate staffs to assist minority businesses with the procurement procedures developed pursuant to this code.
- (2) Special Publications. The chief procurement officers in cooperation with other appropriate private and state agencies may issue supplementary instructions designed to assist minority businesses with the state procurement procedures.
- (3) Source Lists. Chief procurement officers shall maintain special source lists of minority business firms detailing the products and services which they provide. These lists shall be made available to agency purchasing personnel.

(4) Solicitation Mailing Lists. The chief procurement officers shall include and identify minority business on the state's bidders' list and shall ensure that these firms are solicited on an equal basis within nonminority firms.

(5) Training Programs. The chief procurement officers shall work with appropriate state offices and minority groups in conducting seminars to assist minority business owners in learning how to do business with the State.

(6) Fee Waivers. Upon request by an MBE certified by the Small and Minority Business Assistance Office, user or subscription fees for services provided by the chief procurement officers may be waived for an MBE.

Regulations for Negotiations with State Minority Firms

A. Regulations shall be issued by the board that designate procurement contracts as deemed appropriate for negotiation with certified, South Carolina based minority firms. Among the criteria that shall be used to determine such designations are:

- (1) The total dollar value of procurement in South Carolina.
- (2) The availability of South Carolina based minority firms
- (3) The potential for breaking the contracts into smaller units, if necessary to accommodate

(4) Insuring that the College shall not be required to sacrifice quality of goods or services.

(5) Insuring that the price shall have been determined to be fair and reasonable, and competitive both to the College and to the contractor and results in no loss to the college.

B. (1) Firms with state contracts that subcontract with minority firms shall be eligible for income tax credit equal to four percent of the payments to minority subcontractors for work pursuant to a state contract. Such subcontractors must be certified as a minority firm as defined in Section 11-35-5210 of this code.

(2) The tax credit is limited to a maximum of twenty five thousand dollars annually. A firm shall be eligible to claim a tax credit for a period of five years from the date the first income tax credit is claimed.

(3) Any firm desiring to be certified as a minority firm shall make application to the Small and Minority Business Assistance Office (SMBAO) as defined by Section 11-35-5270, on such forms as may be prescribed by that office.

(4) Firms claiming the income tax credit shall maintain evidence of work performed for a state contract. All records shall be available for audit by the Department of Revenue in accordance with prevailing tax statutes.

Minority Business Enterprise (MBE) Utilization Plan

The College falls under the auspices of the State MBE Utilization Plan as defined in this Section. Progress reports shall be submitted to the SMBAO not later than ten days after the end of each fiscal quarter to include

(1) number of minority firms solicited; (2) number of minority bids received; and (3) dollar amount of minority bids awarded.

11-35-5250, 11-35-5260, 11-35-5270 shall be adhered to as defined in the South Carolina Procurement Code regarding the MBE Utilization Plan.

Reporting of Minority Business shall be quarterly. Files are maintained in the procurement office.

19. OPERATING PROCEDURES

Approval levels for purchase requisitions are preset in the Banner system. They are as follows:

01 - 1,000 - Dept. Head Only / 1,000.01 - 2,000 Dept. Head + Academic Dean or Dept. Mgr. /

Above 2,000 Dept. Head + Academic Dean or Dept. Mgr. + VP / 10,000 and Higher - +President

It is the preferred method of the College to have all purchase requisitions processed via the Banner Online Requisitioning System. Accurate and specific information pertaining to the goods and services desired, i.e., quantity, description, unit of measure, specifications, unit of cost, delivery dates and locations, vendor selection, accounting distribution and any special instructions must be entered. After the requisition is completed, it will go through the electronic approval hierarchy before being submitted to finance for coding review and then to Purchasing for price review and order placement. There are special circumstances, when a paper requisition form may be used. These forms can be obtained from the College website. This requisition form is to be properly completed, approved by the department head, division dean (if in the faculty area), and the appropriate vice president (if applicable) before being submitted to finance for coding review and to Purchasing for price review and order placement. Since this is the most important form of communication between the various departments and the procurement department, it must present specific and complete details pertaining to the goods and services desired. **See attachment #6**

Capital Equipment Purchases –

Definition: \$2,500 = Fixed Asset and needs an asset tag

\$5,000 = Capital equipment and needs an asset tag.

Annual Budget = When preparing your annual budget, if you know of a piece of equipment that you will need to purchase during the next fiscal year to replace an obsolete or broken equipment, you should add it to your budget. This is not the process for new technology!

Process - If you need new equipment and the cost exceeds \$2,500 and it was not included on your annual operating budget:

1. Get a price quote. Ask Procurement or IT to assist you with this process.
2. Fill out a Minor or Major New Equipment Request Form. **See Attachment 6A &6B**
3. Obtain all necessary signatures before giving to your VP to take to Cabinet.
4. If Cabinet approves your request, VP Hawley will give to Accounting for a fund code.
5. Accounting will then give to Procurement for order placement or bidding process.

Signing a vendor's contract is the same as creating a purchase order as it commits funds to be paid by the college. You must have an approved purchase order number before a contract is signed.

When an item must be compatible with existing equipment, the reason must be clearly explained and the Brand Justification form MMO#139 attached to the requisition. **See attachment #7**

The requestor is responsible to provide the procurement department with:

1. W-9: If the vendor is a new vendor, the complete name, address and telephone number along with the federal employer identification number should be on the requisition.
2. The preferred method for order placement is via email. Requester is asked to provide purchasing with the vendor's sales office email address and the name of the account representative if known.
3. If a quote(s) is received, it should be attached to the paper requisition. If using on-line requisitioning, forward quotes via e-mail to the Purchasing Specialist. If quotes are provided,

they must be written from qualified sources and addressed to HGTC. Quotes from \$25,000.01 or higher must be solicited via SCBO by the Procurement office. Over \$250,000.00 shall be sent to the State Materials Management Office to be solicited.

4. Registration forms, membership forms, order forms etc. should be completed by the requester. These documents need to accompany the requisition via email to the Purchasing Specialist. If the requisition is for services already rendered, and the invoice has been received, a copy of the invoice must be forwarded to the Purchasing Specialist along with the requisition. Note that committing College funds without prior approval is a procurement violation.

NOTE: Only the Procurement Manager, VP of Finance and Business Affairs, and the President have the authority to sign a contract that commits funds from the College to a Vendor or Organization.

Upon receipt of the requisition in the Procurement Office, it is then determined in accordance with the South Carolina Procurement Code the process in which the procurement will be made.

All purchase orders will be placed with the vendor by the Procurement department via email. Confirmation of receipt of the order will be expected from vendor. Vendor will also be advised to reference purchase order number on respective invoice(s). If the purchase order is for services such as membership dues or reservations, the accounting department will mail a copy of the vendor's paperwork with the check. If order has already been completed, a copy of the invoice must accompany the requisition and be sent to Purchasing for processing and then forwarded to accounting for payment. A check cannot be mailed without sufficient information and forms to satisfy government guidelines. The purchasing department reserves the right to check pricing and obtain quotes. If savings can be achieved by using another source, the requester will be notified.

When shipment is received, it is delivered to the requestor by our in-house couriers. The order shall be verified against the purchase order before payment is made. If the order is complete, the requestor shall sign a copy of the PO and email to the accounts payable department. However, on partial orders, the receiving copy will be carefully marked with quantity received and forwarded to A/P for partial payment. Any subsequent deliveries, against that order, will be noted on a copy of the purchase order and also forwarded to A/P until order is complete.

All invoices are received in accounts payable, verified and payment made.

All purchases made via the Purchasing Card must adhere to the procurement guidelines.

The Procurement Office maintains a limited number of catalogs to assist departments in preparing requisitions. Requesters are encouraged to contact the purchasing department to assist with obtaining quotes and negotiations with vendors. Do not wait until you have an urgent need for a piece of equipment to notify the purchasing department. Allow at least three (3) weeks for most solicitations done in-house and four (4) months for all solicitations done by the State Procurement Office.

Amendment to Purchase Order

When an amendment to a purchase order is needed, it shall be noted on the receiving copy of the purchase order if under \$100 or 10% of the total requisition. If the amount exceeds the limit listed above, a copy of the requisition and invoice shall be returned to the requester stating that a signed justification by the supervisor and be returned to the Procurement Manager where in Purchasing completes a change order to the original purchase order if it is still in open status or creates a second

purchase order (considered a change order).

State Term Contracts

Term contracts are established by the Materials Management Office for a specific product or service for a specified time. It is mandatory that the college procure the requirements for goods or services during its term. If the college is offered goods or services at a price that is at least ten percent less than the term contract for the same goods or services, it may purchase from the vendor offering the lower price after first offering the vendor holding the term contract the option to meet the lower price. If the vendor holding the term contract meets the lower price, then the college must purchase from the contractor vendor. A term contract may be a multi-term contract as provided in Section 11-35-2030 of the Code. All products or services meeting the 10% rule, must be reported on the MMO quarterly report.

Open Purchase Orders

An open purchase order is created when the vendor has been identified, but does not know the exact items or quantities that they will need. It is created the same as a standard purchase order, but the item description will say something like “Misc. Teaching Supplies for Early Childhood Learning”. The dollar amount will be an estimate of the value that is needed for the fiscal year and cannot exceed \$10,000. Once created, this money will be accrued in the departments’ budget and will not be available to spend on other orders. It is important for the requester to manage these Open PO’s carefully. The requester can place orders against this Open PO and any unused dollars will be cancelled at the end of the fiscal year.

Receipt and Acceptance of Supplies or Services

Acceptance of supplies or services shall be indicated by signature and date on copy of the purchase order by the authorized college representative after verification and notation of any exceptions.

Direct Purchase Order – Expenditure Authorization

In some cases, the college has deemed it more cost effective to authorize department heads to purchase goods or services.

- 1) The Superintendent of Buildings and Grounds has been given the authority to use the Expenditure Authorization for purchasing certain emergency repair items and services as deemed appropriate for the efficient operation of his departments.
- 2) The Culinary Arts Department Head and his designee has been given the authority to purchase food supplies needed to support their respective departments.
- 3) Others as deemed appropriate by the Vice President for Business Affairs.

Purchasing Card – Expenditure Authorization

The Purchasing Card Program allows full-time employees, upon approval of the appropriate VP, Procurement Manager, and the VP of Finance and Administration to procure supplies and services using the p-card. Users may have varying limits depending on their need.

HGTC has adapted the SC State Procurement Code for P-Card use. The guidelines of this code are strictly adhered to. Any user that violates this code will be written up with their VP being notified of the violation and it will be kept on file in the Procurement office. Violations may result in users' card being suspended.

A formal written request, approved by the user's Dean, Supervisor, Manager, VP of Finance and Business Affairs and the Procurement Manger must be completed before obtaining a p-card. Each new user will be given a manual and brief training session before receiving their p-card for use.

The Organizations P-card account manager is the Procurement Manager. Audits will be conducted monthly by the Finance department. **See Attached #8 and #9**

Walmart Credit Card Use

HGTC will allow employees to make purchases at the local Walmart store if the items that are needed cannot be ordered through the procurement department or time does not allow the purchase to go through the purchase requisition process. Their manager via a Walmart Purchase Request form must preapprove employee. **See Attachment #10** Forms are filed in the purchasing office. The employee will pick up the card from purchasing department if on the Conway campus, Student Accounts if on the Grand Strand campus and Administrative Assistant if on the Georgetown campus. After purchase is made, employee will enter a requisition into Banner to match the purchase and return the receipt and card to the original cardholder. All receipts will be forward to purchasing to be matched with the purchase order and sent to accounting for payment.

Ordering Procedure for Printed Material

HGTC maintains an in-house print services department. Print services has the capability to produce the majority of printed materials required for use by our college. If and when the need arises for us to hire an outside printing firm to provide services, we follow the SC Government Printing Services Manual and the State Procurement Code. <https://procurement.sc.gov/agency/resources-and-forms/procurement-forms>

Professional and Consultant Services Ordering Procedures

A purchase order will be issued, in accordance with the South Carolina Consolidated Procurement Code, for professional and consultant services under the certification limit of \$250,000.00 local funds only. Procurements exceeding the limit will be forwarded to the State Procurement Office for processing.

Information Technology Ordering Procedures

It will be the responsibility of HGTC's IT department to assist all requesters with specifications for their needs. They may also assist in obtaining price quotes and vendor selections. State contracts must be used if they exist. The Procurement department will be responsible to review all pricing and/or State Contract availability and to place the orders with the vendor. Purchases will be made in accordance with the South Carolina Consolidated Procurement Code and through the Information Technology Committee.

A master plan for Information Technology procurements as defined in Section 11-35-310 of the Procurement Code will be submitted for approval to the Division of General Services, after which

acquisitions of Information Technology shall be through the Procurement Management Office. The VP for Information Systems of HGTC shall be responsible for preparing and submitting the Plan. A copy shall be maintained in the Procurement Office.

Construction and Related Professional Services

HGTC will adhere to the guidelines established by the Office of the State Engineer in conjunction with the South Carolina Consolidated Procurement Code requirements for construction procurements. The following HGTC positions will act as the responsible team for making sure the guidelines, policies, and procedures are follows:

VP Finance and Administration

Facilities Director

Procurement Manager

Assistance to Minority Business

The South Carolina Consolidated Procurement Code requires that all state agencies formulate a Minority Business Enterprise Utilization (MBE Plan). Under this plan, procedures have been established to assist minority-owned businesses to fully participate in all plans of the procurement process, in order to have balanced economic and community growth throughout the state. The college is supportive of this effort, and quarterly progress reports are submitted to Central State Purchasing. The statement of policy and regulations may be found in Article 21 of the South Carolina Consolidated Procurement Code.

Equipment Inventory Control

The control of Capital equipment will be the responsibility of the Inventory Control coordinator based on guidelines as outlined the State Board for Technical and Comprehensive Education Equipment manual. After inventorial items are received and tagged with the bar code, the receiving copy of purchase order is initialed and sent to accounts payable. The inventory item(s) are then added to AIMS, the College's automated inventory management system. An annual inventory audit is conducted through each department head. A spot check audit will be conducted by the inventory control person. A property transfer report will be used to control the moving of equipment.

Disposition of Property and Supplies

The property and inventory control department will be contacted by the department head and given a property disposal form completed and signed by the department head. The form is then signed by the Vice President for Business Affairs. The equipment and scrap materials or "junk" are to be stored, classified and listed until such time as they can be disposed of according to State Regulations. Items that cannot be located during an inventory audit will be reported to the state using the Report of Survey/Inventory Adjustment Form. This will allow the item to be taken off inventory.

Surplus Property

A Department Head shall contact the inventory control person stating that that department has surplus property no longer needed. The inventory control person will check to see if any other department

within the College can utilize the equipment. If not, he will relocate the property to the warehouse and reassign it to the Warehouse Department. State Surplus will be contacted and will verify with an on campus visit that the equipment is surplus and will be removed by the State according to guidelines outlined in Procurement Code Section 11-35-3820.

Trade in Sales

Unless otherwise provided by law, the College may trade-in personal property. The trade-in value may be applied to the purchase of similar items. The trade-in value of such personal property shall not exceed an amount as specified in regulations promulgated by the board and shall be preapproved by the State prior to any trade in commitment or transaction.

Office Supplies

Purchases for expendable supplies in the amount of \$.01 to \$999.99 should be ordered. on-line, from one of the vendors listed on the State Contract for office supplies. Supplies are charged to departmental budgets monthly. Employee must have filled out an FSI approval form with all signatures before accessing the on-line ordering system. **See Attached #11**

Interagency Contract

The college may sell to, acquire from, or use any supplies belonging to another public procurement unit or external procurement activity in accordance with the requirements of Article 5 and 15; provided that such procurement shall take place only when the college has good reason to expect the intergovernmental procurement to be more cost effective than doing its own procurement.

The college may enter into an agreement with any other public procurement unit or external procurement activity for the cooperative use of supplies or services under the terms agreed upon between the parties; provided that such cooperative use of supplies or services shall take place only when the college has good reason to expect the cooperative use to be more cost effective than utilizing its own supplies and services.

Interagency Mail

This service has been discontinued by the State Offices due to lack of use.

Unauthorized Procurement Procedures

The ratification of an act obligating the State in a contract by any person without the requisite authority to do so by an appointment or delegation under the Procurement Code rests with the Office of General Services. **See attachment #12**

1. The President of HGTC retains the authority to ratify unauthorized procurements up to \$100,000.00.
2. Quarterly recording of all unauthorized procurement will be the responsibility of the procurement manager.
3. Corrective Action and Liability – In either case listed above, a written determination as to the facts and circumstances surrounding the act shall be prepared, what corrective action is being taken to

prevent reoccurrence, action taken against the individual.

Budget Accounts – Fund

Designated funds and budget accounts are established by the Vice President Finance and administration.

Personal Purchases

The Procurement Department does not enter into any negotiations or become involved in any transaction for the purchase of anything whatsoever for the personal account of employees. Items that might be classified as personal in nature and are suspected as inappropriate expenses may be questioned or disallowed.

Petty Cash

The College has established a petty cash fund to minimize the paperwork and time involved in small emergency purchases. No petty cash funds will be distributed without supervisor approval and must be less than \$50.00. This is not to be used to circumvent the purchase order system. Petty Cash is to be used once at any given time. Receipts will not be honored that apparently are circumventing the petty cash system. Like items split on different receipts, different times, or any other action that indicates such will be returned to the appropriate vice president for justification and approval. The person in charge of petty cash disbursements will have the responsibility of monitoring the fund.

Retention of Procurement Records

All procurement records shall be retained and disposed of in accordance with record retention guidelines and schedules approved by the Department of Archives and History after consultation with the Attorney General. All retained documents shall be made available to the Attorney General or a designee upon request and proper receipt therefore. <https://dc.statelibrary.sc.gov/handle/10827/7053>

Equipment Repair

For copier repair, the Print Shop Manager shall be contacted, who will make the repairs if possible or contact the dealer.

IT equipment repairs should be channeled through the Department for Information System.

All other requests for repair should be forwarded to the Purchasing Office.

College Vehicles

The College no longer maintains a fleet of vehicles for faculty and staff use. We strictly utilize a rental contract with Enterprise for rental cars for all campuses. Use is for official college business only, and in lieu of private automobiles when available. Any driver must have a valid South Carolina driver's license. The vehicle coordinator (procurement office) will maintain a car reservation and check out

system. Keys to cars should not be held when the vehicle is not in use. Accidents and/or malfunctioning of vehicles should be reported to the vehicle coordinator immediately. All vehicles need to be returned with a full tank of gas. Users will be charged a rental fee. Rental car forms can be found on the college procurement website. **See Attached #13**

Complaint Procedures

A. Agency Complaints

Complaints should be sent to the procurement department in writing, and complaints will be fully investigated. A telephone call to the vendor made by the Procurement Manager often will clarify the problem. However, if it does not, a state complaint form will be initiated to solve the problem.

B. Vendor Complaints

Verbal complaints will be resolved informally. Written complaints will be handled in accordance with the 1976 South Carolina Code of Law, Title II, Chapter 35, Article 17. This article contains the basis for processing and resolving any and all protests by vendors/contractors. These procedures apply in three areas: (1) Protests of Solicitation and Award; (2) Department of Suspension; (3) Contract and Breach of Contract controversies

C. Invoice Discrepancies

In regard to invoices and purchase orders, the accounts payable supervisor will determine if a problem can be solved by discussion with the requestor. If a problem still exists, it will be given to the Procurement Manager to be handled. All protests relating to procurement activities that cannot be resolved by the Procurement Manager will be referred to the Vice President for Business Affairs for further action. Guidelines as outlined in the Directive 95-01 from the State Procurement Manager will be issued whenever a complaint relating to purchase orders issued or contracts awarded by the Materials Management Office arises. Form #141 will be used to report the complaint.

FOIA Requests

Any FOIA requests for information regarding purchase orders, solicitations or construction documents shall be forwarded to the Procurement Department Manager for processing. We will follow the rules as written by the State of SC at https://admin.sc.gov/FOIA_Request

General Information

The Employee Procurement Quick Guide is available for all Faculty and Staff to use for helpful hints regarding the College's procurement processes. It is listed on the procurement tab of the college website. **See Attached #14.** The department also regularly hosts training classes for all faculty and staff as part of the

Process For Business Travel

The College has implemented a process for all employees to follow when traveling on behalf of the College. Attached is a detailed description of process along with guides to help you find the proper forms for use. **See Attached #15**

Procurement Manual Attachments

Attachment # 1 Procurement Organization Chart

Attachment #2 Small Procurement Procedures

Attachment # 3 Sole Source Document

Attachment # 4 Justification for Emergency Procurement

Attachment # 5 Asset Management Process

Attachment # 6, 6A & 6B Sample Paper Requisitions

Attachment # 7 Brand Justification

Attachment #8 P-Card Guide

Attachment #9 P-Card Request Form

Attachment # 10 Walmart Card Use Approval Form

Attachment # 11 FSI On-line Ordering Request Form

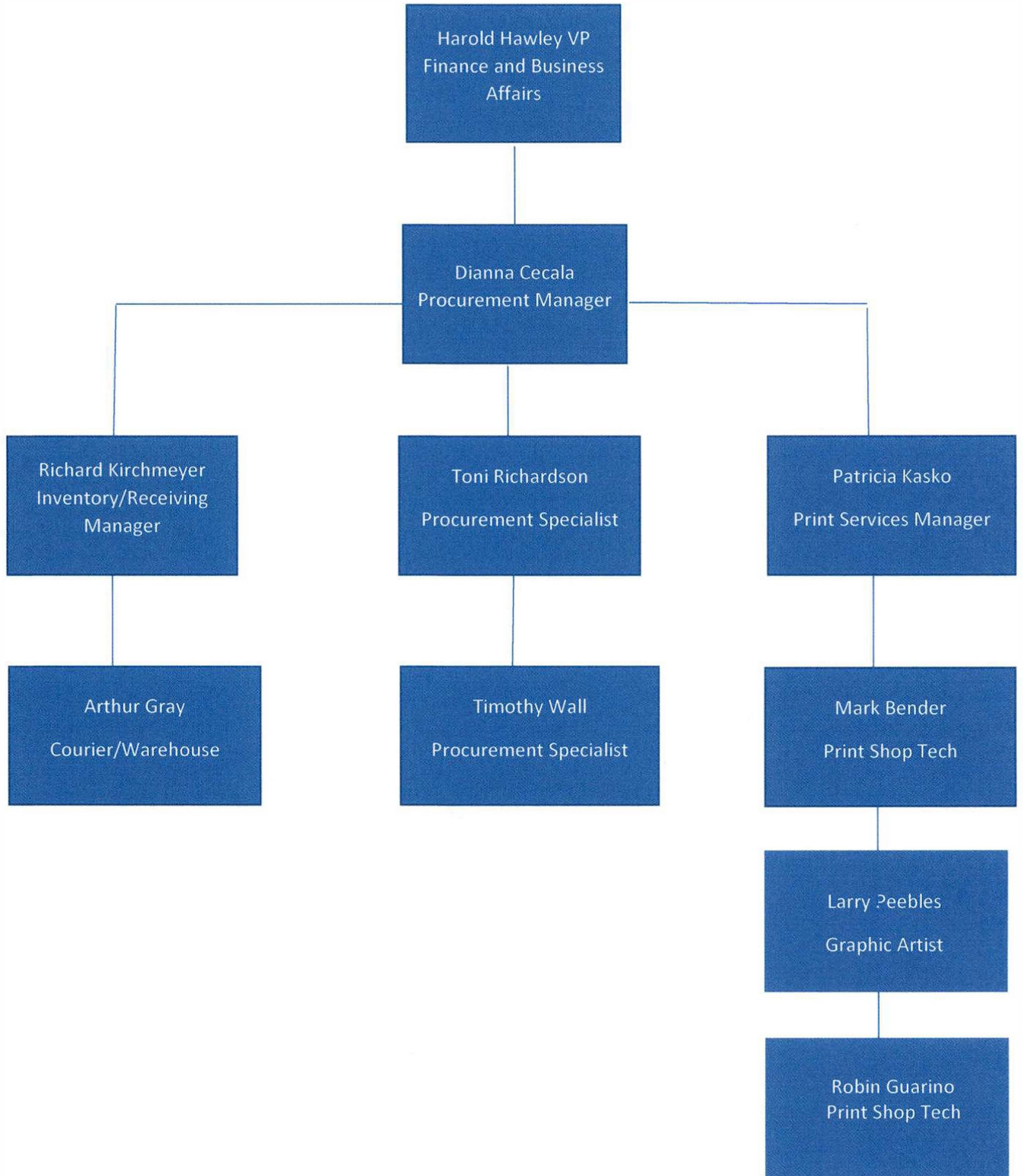
Attachment # 12 Procurement Violation Ratification Form

Attachment # 13 Rental Car Request Form

Attachment # 14 Employee Procurement Guide

Attachment #15 Process for Business Travel

ATTACHMENT #1



SMALL PROCUREMENT PROCEDURES

COMPETITION REQUIRED						
X = Total Potential Value of Procurement	SCBO Publication Required			Bona Fide Written Bids or Quotes Required		
	COTS	Construction	Everything else	COTS	Construction**	Everything else
X ≤ \$10,000	No	No	No	No	No	No
\$10,000 < X ≤ \$25,000	No	No	No	Yes – 3 or more*	Yes – 3 or more*	Yes – 3 or more*
\$25,000 < X ≤ \$50,000	No	No	Yes	Yes – 3 or more*	Yes – 3 or more*	Yes – 1 or more
\$50,000 < X ≤ \$100,000	No	No	Yes	Yes – 3 or more*	Yes – 3 or more*	Yes – 1 or more

APPLICABLE PROTEST PROCEDURES									
X = Total Potential Value of Procurement	Posting of Award Required			Protest Rights			Delay in Award Becoming Final After Posting Award		
	COTS	Construction	Everything else	COTS	Construction	Everything else	COTS	Construction	Everything else
X ≤ \$10,000	No	No	No	No	No	No	N/A	N/A	N/A
\$10,000 < X ≤ \$25,000	No	No	No	No	No	No	N/A	N/A	N/A
\$25,000 < X ≤ \$50,000	No	No	No	No	No	No	N/A	N/A	N/A
\$50,000 < X ≤ \$100,000	Yes	Yes	Yes	Yes	Yes	Yes	No***	No***	No***

* If published in SCBO, only one bona fide written quote from a responsible bidder is needed.

** Procuring agency does not have to but may require bidders to provide bid bonds for projects of \$100,000 or less. Procuring agency must require performance and payment bonds on projects greater than \$50,000.

*** Procuring agency does not have to wait seven business days for the notice of intent to protest period to expire before allowing the awarded vendor to start performance.

ATTACHMENT #3

Form>MMO#102
State Fiscal Accountability Authority
8/9/2021

JUSTIFICATION FOR SOLE SOURCE PROCUREMENT

Agency: Click or tap here to enter text.

Sole Source Vendor: Click or tap here to enter text.

Based upon the following determination, Agency proposes to acquire the supplies, construction, information technology, and/or services described herein from the Vendor named above per S.C. Code Ann. §11-35-1560 and S.C. Regulation 19-445.2105, Sole Source Procurement.

Description of the Agency need that this procurement meets: Click or tap here to enter text.

Description of market research Agency performed to determine the availability of products or services that would meet the Agency's needs: Click or tap here to enter text.

Description of supplies, construction, information technology, and/or services Vendor will provide under the contract: Click or tap here to enter text.

Detailed explanation why no other vendor's supplies, construction, information technology, and/or services will meet the needs of the Agency: Click or tap here to enter text.

Authorized Signature

Printed Name: Click or tap here to enter text.

Title: Click or tap here to enter text.

Date: Click or tap to enter a date.

Notes:

Authorized signature is the agency head unless the agency head has delegated that authority. Delegation of authority must be submitted to the Materials Management Officer in writing.

The Agency must obtain a Drug-free Workplace certification from the Vendor if the sole source procurement is \$50,000 or greater.

ATTACHMENT #4

Form>MMO#103
State Fiscal Accountability Authority
8/9/2021

JUSTIFICATION FOR EMERGENCY PROCUREMENT

Agency: Click or tap here to enter text.

Emergency Vendor: Click or tap here to enter text.

Agency has contracted with or plans to contract with Emergency Vendor for the supplies, services, information technology, or construction described below per S.C. Code Ann. §11-35-1570 and S.C. Regulation 19-445.2110, Emergency Procurement.

Describe the nature of the emergency condition and the resulting immediate threat to public health, welfare, critical economy and efficiency, or safety that this procurement responded to: Click or tap here to enter text.

Description of the facts and circumstances giving rise to the above describe emergency condition and threat: Click or tap here to enter text.

Basis for Selection of the Vendor – include a description of competition Agency conducted or will conduct, if any, and explain why more extensive competition was/is not practical under the circumstances: Click or tap here to enter text.

Description of supplies, services, information technology, or construction: Click or tap here to enter text.

Authorized Signature

Printed Name: Click or tap here to enter text.

Title: Click or tap here to enter text.

Date: Click or tap to enter a date.

Notes:

Authorized signature is the agency head unless the agency head has delegated that authority. Delegation of authority must be submitted to the Materials Management Officer in writing.



Horry Georgetown Technical College

Asset Management Process

Updated 02/16/2022

President: Dr. Marilyn Fore

VP for Finance and Business Affairs: Harold N. Hawley

Procurement Manager: Dianna L. Cecala

Inventory Control Manager: Richard H. Kirchmeyer

Purpose of Manual

The purpose of this manual is to consolidate all procedures and policies relating to equipment management at Horry Georgetown Technical College from acquisition through disposition. These procedures and policies are within the requirements set by the State Board for Technical and Comprehensive Education and the SC Consolidated Procurement Code & Regulations Annotated, Article 15. Supply Management and Section 19-445.2150 Surplus Property Management. Some procedures change in accordance with evolving College policies.

Responsibility and Accountability

Inventory Control Manager:

This position is accountable to the Procurement Manager for the coordination of equipment management, communication of policy to all departments, and final disposition of all equipment.

Department Head and/or Person Assigned Equipment:

Accountable to their supervisor and vice president for the management of equipment assigned to them and adhering to State and local policies and procedures as outlined in this manual.

All Employees:

Accountable to the College President for the security of equipment. Before any equipment is moved, approval by the department head must be given. It is the responsibility of the department head to notify the inventory manager of the equipment move so that the change may be entered into the inventory system. If the equipment to be moved is Computers or IT related equipment, then the IT department must also be notified prior to any move. The use of the College's "Track-It" system will be used for all requests to move inventoried equipment.

Specific questions about inventoried equipment management policies can be directed to the Inventory Manager, Richard Kirchmeyer at ext. 5338, or the Procurement Manager, Dianna Cecala at ext. 5207.

New Equipment

Requisition for Purchase

The requisition is the most important document used in the management of new equipment. This is the requester's opportunity to give procurement accurate information that will be used in the process of obtaining quotes, performing a solicitation and procuring the equipment.

1. Detailed Specifications
2. Department Name and Organization Code
3. Quantity
4. Delivery Information
5. Trade-In of Existing Equipment
6. Sole Source Justification
7. Brand Specification Determination

Any request for equipment with a value > \$2,500 must be requested using the New Equipment Form which is available from your Dean, VP, Finance or Purchasing Office. All requests must be approved by Cabinet. Purchasing can assist you with obtaining a budget for your new equipment request.

Purchase Order

The purchase order will include an asset tag number which is assigned by the Procurement Manager. A copy of the purchase order with this information will be given to Finance, Requester, Receiving and Purchasing so that they are all aware that the order has been placed and that when the equipment is received, information needs to be input into the AIMS system.

1. Description
2. Department Name and Organization Number and location
3. Manufacturers' Name
4. Vendors' Name
5. Serial Number
6. Funding Source
7. Purchasing Order Number
8. Price

Procurement policies prevent the use of p-cards, Walmart Cards or State Contract with FSI self-serve ordering system for the purchase of inventoried equipment.

Receipt and Tagging

The purchase order is used to help determine if equipment will be inventoried.

When new equipment is delivered to the Receiving Department, the items are:

1. Checked by the Receiving staff to insure there is no shipping damage.
2. Logged into AIMS per the criteria above
3. Asset Tag is affixed to equipment in a safe but easily accessible location
4. Note on the purchase order that item has been received and file
5. Delivered to requester
6. Assembled if assembly is not required by vendor.

NOTE: if equipment is IT related, steps 5 and 6 are replaced with:

5. Call the IT department to arrange for delivery
6. Make delivery per IT department's instructions

If for some reason equipment is received directly by the requester, then it is their responsibility to contact the Inventory Manager to let them know and arrange for him to apply asset tag and input the information. The Inventory Manager will track his copy of purchase orders, and if he sees a purchase order that has not been received and it is past the expected delivery date, he will follow-up with requester and/or purchasing to check on the status of order.

Equipment Location Updates

Physical Move of Equipment

It is the responsibility of the department head to know at all times where his/her equipment is located and therein lays the responsibility of notifying the Inventory Manager immediately, so that the changes can be made in the AIMS system. This can be done by a phone call, e-mail or use of Track-It. If the equipment move is not permanent (defined as 4 weeks or less) then it is not necessary to log the new location into AIMS.

If assistance is required due to the size of the equipment, a maintenance request should be processed. This form is located in the employee section of Wavenet.

If the equipment is IT related, then a Track-It must be entered and wait for a response from the IT staff.

Physical Inventory Process

The physical inventory process will begin no later than October 1st of each fiscal year and be completed no later than June 15th. It is the policy of HGTC to perform a count 100% of all Capital equipment (> \$5,000) and 100% of all Non-Capital equipment (\$2,500.00 - \$4,999.99). Each item must be scanned. If that is not possible due to the location of equipment, then a book will be maintained in the Inventory Manager's office of all non-scannable equipment. This equipment will be physically views and accounted for each year.

Before performing a physical inventory in any given area, the user of that space may or may not be contacted. The determination will be the ease of entry into the location.

1. The first scan of equipment will be performed on a building by building basis. Once the building has been swept for all visible equipment, a report is generated showing the missing equipment by room number. A second scan is performed in order to reconcile and account for those items. All outstanding equipment that cannot be located is then placed on a "missing list" which is forwarded to the appropriate department head for further query.

2. Although it is the responsibility of the inventory manager to locate and scan all equipment, the department head is responsible for locating all lost or misplaced equipment. The inventory manager will notify the department head of missing equipment and will coordinate with them to meet to locate and scan equipment. Items that cannot be located by a department head will be added to a final missing list. Once the full inventory has been completed, this list will be revisited and reviewed again by department head and staff. If it is determined that the equipment cannot be located, a formal report is prepared per state guidelines. Prior to filing the final report, the investigative process conducted by the department head and the inventory manager is both thorough and exhaustive.

3. Once equipment has been deemed missing or lost, the inventory manager will file paperwork in accordance with State procedure and remove the item from AIMS. If the final disposition of a missing asset is deemed criminal in nature, a police report will be attached with the inventory report.

Disposition of Equipment

Adjustments

1. Adjustments include such items as outdated software, missing/stolen equipment, trade-ins, authorization to use existing equipment for parts and returns to vendors. An adjustment form must be completed and signed by the Department head and their Vice President for all adjustments.
2. Authorization to use existing equipment for parts must be granted by the State Inventory Control Office prior to removing parts from equipment.
3. Missing and stolen equipment requires a Public Safety incident report and a police report. Reference procedure below for thefts and stolen equipment.
4. When using the adjustment report to remove software from inventory, software disk(s) and documentation must be turned in with the adjustment report.
5. When using the adjustment report to remove equipment that will be traded in on new equipment, a completed and approved form #137 "Request for Trade-In Document" must be attached to the adjustment report. Refer to "New Equipment"

Thefts/Stolen Equipment

The State Board for Technical and Comprehensive Education policy requires that all equipment that is missing or cannot be located must be reported to the local police.

1. Thefts should be reported to Public Safety immediately by phone and then followed up by an Accident/Incident Report. Copies of this report are distributed to a user group which includes the Inventory Manager.
2. The following information is needed when reporting stolen/missing equipment:

Item Description	Serial Number
Asset Tag Number	Equipment Value
Department Information	Date of Incident
Location of Incident	

Surplus and Excess Equipment

Do not destroy or throw away or donate and equipment. No matter what the condition equipment is in or what type of funds were used to procure it, all surplus equipment must be turned in for the Inventory Manager to process through the State Surplus Property Management Office. This also applies to equipment that does not require a tag. Disposing of any equipment locally is strictly prohibited.

1. Computers and servers require the added step of erasing data stored on hard drives. This process must be coordinated by the IT staff before equipment can be turned in to State Surplus.

2. The Department Head initiates all surplus requests to the Inventory Manager and IT Director. The request should include confirmation that all surplus equipment without an asset tag is not on the active inventory. The following information is required for processing:

Equipment Description	Asset Tag Number
Serial Number	Location of Equipment
Condition of Item	

3. IT and the Inventory Manager will coordinate the removal of equipment for the requestor's department. They will supply requester with the paperwork needed to be signed off. Storage space in our dock is limited so in the case of large equipment, it may be decided to keep the equipment at its' current location and have State Surplus pick up or sell the equipment on-site.

Cannibalizing Equipment

1. Definition – The removal of serviceable parts, components, or assemblies from on item of equipment for installation on another item of equipment to serve the same basic function.

2. Contact the Inventory Manager for assistance in completing necessary State forms to obtain authorization for procedure. The approval process may take 4 to 6 weeks to complete and prior authorization must be given before removing any parts.

Inventory Manager's Procedures for Turned-in Equipment

1. Once an asset has reached the warehouse, or has been staged at a specified other location, the inventory manager will scan the bar code and change the status of the asset in AIMS to "turned in." If the asset does not have a bar code tag, it is placed on a separate state form #1 turn-in document. This document is signed by the president and inventory manager and is then turned in as an attachment for that month with any other turn-in documents that were generated via the Asset Information Management System for tagged items.

2. The inventory manager will then make all efforts to ensure that no other departments can use the asset, in which case, the asset will remain college property and will be assigned to said department and removed from the TID list for that month's turn-in process. At this point, following a campus-wide query, the IM will place the asset in "surplus mode" in AIMS and finalize the list of turned in items for that month to have signed by the president. Once the president has signed the turn-in document(s) the forms are sent to SPO in Columbia for screener notification. These forms are requested to be at SPO by no later than the 25th of each month in order to give SPO time to review the assets. SPO will post the assets to other state agencies via a SQL report to ensure that no other agency would like to retain the item for their own use. At this time, SPO sets up a time with the inventory manager to come and screen the assets listed on the turn-in reports.

3. Upon arrival of the state screener, the IM and screener review all turned in assets. The screener will identify and physically mark all items to be secured by SPO with a 6-digit state ID number. These assets are then staged and picked up at a later date by an SPO courier. Assets which were already staged at other locations are also visited and screened in the same fashion as those that were in the warehouse and are also assigned final disposition accordingly.

4. Assets forfeited by the screener become permanent property of the college and are recycled or disposed of in accordance with state procedures. In furtherance of this, the IM will reconcile the AIMS report for that month to reflect which items were retained by the state for "surplus sale" and which items were retained by the college for "junk" and disposal.

ATTACHMENT #6



Signatures/Approval Requirements for Requisitioning

For amounts of \$.01 - \$1,000.00

- *Requestor
- *Department Head
- *Finance

For amounts of \$1,000.01 - \$1,999.99

- *Requestor
- *Department Head
- *Academic Dean (if applicable)
- *Finance

For amounts of \$2,000.01 - \$4,999.00

- *Requestor
- *Department Head
- *Academic Dean (if applicable)
- *Purchasing
- *Finance

For amounts of \$5,000.00 and Up

- *Requestor
- *Department Head
- *Academic Dean (If applicable)
- *Purchasing Manager
- *Finance
- *VP of Department*

For amounts of \$10,000 and Over

Add *President* to the above.

ATTACHMENT #6A



REQUEST FOR MAJOR EQUIPMENT OR SERVICE OVER \$25,000

If State Contract is not available, then:

- \$25,000 - \$50,000 – Must Be Advertised for Quotes
- Greater than \$50,000 – Requires an Advertised bid (IFB) or request for proposal (RFP). Contact Procurement.

Department Name: _____

Requester Name: _____

Department Head (up to \$1,000): _____

Academic Dean/Director (\$1,001 - \$2,500): _____

Vice President (over \$2,500): _____

President (over \$10,000): _____

Cabinet Chair: _____

Vendor Information: (If new, attached W9)

Name: _____

Address: _____

City/State/Zip _____

Phone Number/E-mail _____

QUANTITY	UNIT OF MEASURE	DESCRIPTION	UNIT COST	TOTAL
		Be Sure to Include Shipping & Tax		

PURPOSE OF REQUEST:

STRATEGIC GOALS & OUTCOMES:

ACCOUNTING USE ONLY

FOAPAL _____ FOAPAL _____

FOAPAL _____ FOAPAL _____

Source of Funds: DEPT. _____ GRANT _____ INSTITUTIONAL _____ SEFAC _____

Instructions:

1. Fill out the attached request form and keep a copy for your records.
2. Estimate your cost for Cabinet approval. Make sure to include any installation fees, maintenance fees, shipping fees, and taxes. Consider if this equipment needs IT equipment for support or does it need the maintenance department for any electrical or plumbing needs. Include these costs as well. Please ask the Procurement Office to assist you if you need help with this step.
3. Attach the specifications for the equipment you wish to purchase.
4. Make sure you fill out the purpose of request in full to explain your need. Incomplete documents will be denied.
5. Make sure to include how your order relates to the Colleges Strategic Goals & Outcomes.
6. Obtain all signatures (except for the President's) and give to your VP to present at cabinet meeting.

Cabinet Approval:

NOTE: If this equipment was included in your annual budget and approved at that time, your request does not need to go to Cabinet and can go directly to Accounts Payable for coding.

1. Cabinet meets every Wednesday morning.
2. If your request is denied, your VP will let you know
3. If your request is approved, it will go to Accounts Payable to schedule funds for the purchase.
4. If your request requires a bidding process, it will go to the Procurement office where it will be handled. You will be notified by someone from procurement to discuss the type of bid that needs to be completed, what specifications are required, and the time frame for which you can expect your equipment/service to be ordered.

ATTACHMENT #6b



**REQUEST FOR MINOR EQUIPMENT
Or SERVICES UP TO \$25,000**

Up To - \$10,000	(1) Quote
\$10,000 - \$25,000	(3) Written Quotes
State Contract	(1) Quote

Department Name: _____

Requester Name: _____

Department Head (up to \$1,000): _____

Academic Dean/Director (\$1,001 - \$2,500): _____

Vice President (over \$2,500): _____

President (over \$10,000): _____

Cabinet Chair: _____

Vendor Information: (If new, attached W9)

Name: _____

Address: _____

City/State/Zip _____

Phone Number/E-mail _____

QUANTITY	UNIT OF MEASURE	DESCRIPTION	UNIT COST	TOTAL
Be Sure To Include Shipping & Tax				

PURPOSE OF REQUEST:

Strategic Goals and Outcomes:

ACCOUNTING USE ONLY

FOAPAL _____ FOAPAL _____

FOAPAL _____ FOAPAL _____

SOURCE OF FUNDS: DEPT. _____ GRANT _____ INSTITUTIONAL _____ SEFAC _____

Instructions:

1. Fill out the attached request form and keep a copy for your records
2. Obtain a quote(s) as necessary and attach them to your request. Be sure to include all charges such as shipping, installation, and tax.
3. Attach a document that includes specifications for the equipment you wish to purchase.
4. Make sure to fill out the purpose of the request in full to explain your need. Incomplete documents will be denied.
5. Make sure you list related Strategic Goals and Outcomes
6. Obtain all signatures (except for the President's) and give to your VP to present at Cabinet Meeting.

Cabinet Approval:

NOTE: If this equipment was included in your annual budget and approved at that time, your request does not need to go to Cabinet and may go directly to Accounts Payable for coding.

1. Cabinet meets every Wednesday morning.
2. If your request is denied, your VP will let you know.
3. If your request is approved, it will go to Accounts Payable to schedule funds for the purchase.
4. Then to Procurement for order placement or solicitation for bids.

ATTACHMENT #7

JUSTIFICATION FOR BRAND NAME SPECIFICATION

The agency understands that a "Brand Name" specification is the least preferred type to be used in state procurements. It limits responses to include only the make and model products specified. Potentially equivalent products are not considered for award. The agency offers the following justifications:

NOTE: Explanations will be provided for each brand name specification submitted. The products may be grouped when the explanation is the same for several products. The term "All" can be used if the same explanation applies to all items.

1. The agency cannot identify the salient characteristics of the products to be procured because it lacks sufficient:

Time: (explain)

Expertise: (explain)

Continued

2. The agency needs to standardize its inventory for:

Maintenance: (explain)

Compatibility: (explain)

The agency further certifies that it is not aware that the products specified qualify as sole sources. It believes that there are or may be multiple vendors that can offer a price on the makes and models specified.

DATE

GOVERNMENTAL BODY

AUTHORIZED REP.'S PRINTED NAME

AUTHORIZED REP.'S SIGNATURE

MMO APPROVAL SIGNATURE

TITLE

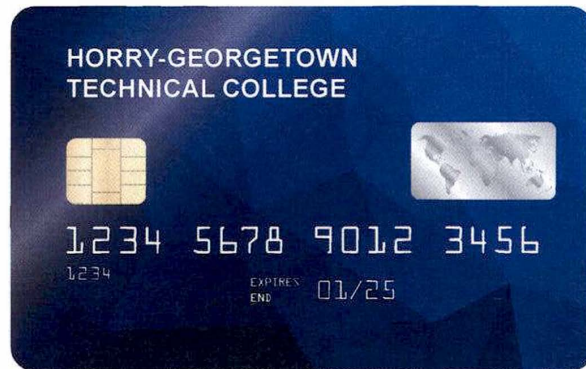
ATTACHMENT #8

WHAT IS THE PURCHASING CARD?

The Purchasing Card is a VISA credit card issued by Bank of America. It provides a fast, cost-efficient method for purchasing **low-dollar** supply (non-state contract) items and membership dues.

Cardholder Eligibility

Approved Horry-Georgetown Technical College **Full Time** employees. Or by exception from the President

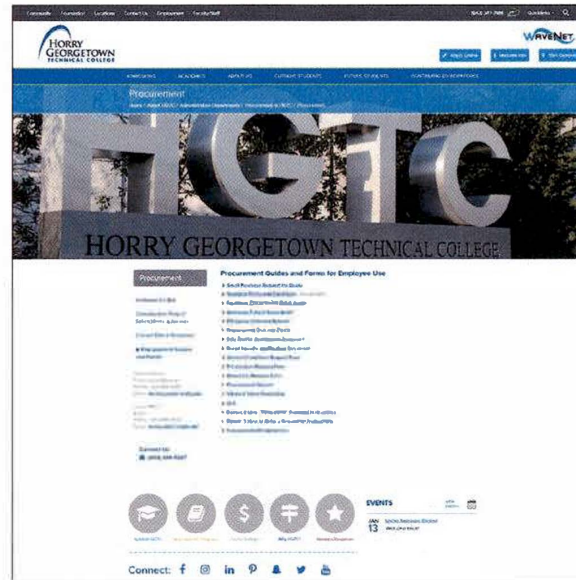


Cardholder Liability

The purchasing card is a corporate charge card that will not affect your personal credit. **It is your responsibility to ensure** that the card is used within the guidelines of the South Carolina Material Management Division of the office of SFAA (State Fiscal Accountability Authority) and Horry-Georgetown Technical College's Purchasing Card Policies and Procedures. Go to: <http://procurement.sc.gov/agency/resources-and-forms/procurement-card> for complete SC State Procurement Card Manual.

INTERNET RESOURCES

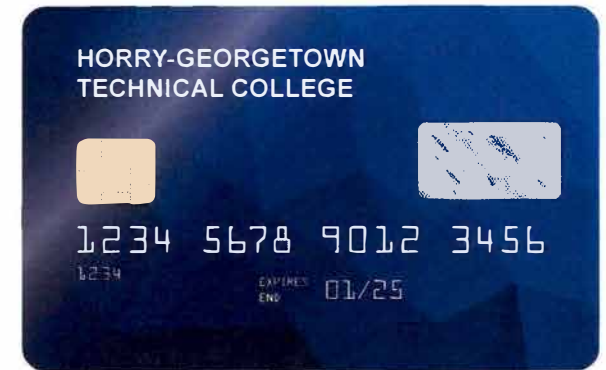
For more information, visit www.hgtc.edu/procurement-resources



PROCUREMENT CARD

QUICK GUIDE

2023-2024



CONTACT INFORMATION

P-Card Administrator – Dianna Cecala
843-349-5207
dianna.cecala@hgtc.edu



CARDHOLDER RESPONSIBILITIES

- Attend training classes on proper use of card.
- Maintaining security of the account number, expiration date, and security code at all times. Allowing other individuals to use your P-card is a violation.
- Maintaining knowledge of State P-Card Policy and internal policies and procedures.
- Ensuring all purchases are allowable purchases according to State and internal P-Card policies.
- Ensuring all purchases comply with purchasing requirements of the Code.
- Ensuring that funds are available prior to making any purchase.
- Obtaining "best value" for the State when making purchases with the P-Card.
- Responsible for obtaining all original itemized receipts. Attach receipts to monthly statement, forward promptly to your Account Coordinator for approval. All statements must be sent to the Accounting office no later than the 10th of the month for processing.
- Attempt to resolve disputes or billing errors directly with the vendor and notify Bank of America if the dispute or billing error is not satisfactorily resolved.
- Ensure that an appropriate credit for the reported disputed item(s) or billing error appears on a subsequent statement.
- Immediately report a lost or stolen card to Bank of America at 1-800-538-8788. Also, notify the P-Card Administrator – Dianna Cecala at 843-349-5207 or dianna.cecala@hgtc.edu.
- Upon terminating employment with the College or transferring departments within the College, the P-Card should be immediately returned to the P-Card administrator.

ACCOUNT CLOSURE

An account may be closed for any of the following reasons, which will also subject Cardholder to disciplinary action in accordance with the Material Management Division of The State Fiscal Accountability Authority and Horry-Georgetown Technical College Policies and Procedures relating to disciplinary action and termination for cause.

The P-Card is FOR OFFICIAL USE ONLY

- A. Cash Advances – are strictly forbidden.
- B. Order Splitting – Splitting transactions to avoid the single transaction limit is strictly prohibited.

Prohibited Purchases

- Personal purchases of any kind (e.g. coffeemakers, microwave ovens, refrigerators). Never use your home address for the "ship-to" as this may be construed as a personal purchase.
- Cash advances in any form.
- Gift cards, stored value cards, calling cards, pre-paid cards or similar products.
- Employee travel expenses, including lodging, transportation (except airline tickets and rental cars), and meals.
- Entertainment, including in-room movies.
- Alcoholic beverages.
- Tobacco products.
- Fuel for State-owned vehicles.
- Any promotional item or apparel imprinted with the HGTC logo or any other logos.
- Professional services (e.g. repairs, speakers, lawn service, etc.)
- Food for consumption.
- Purchases using a P-Card from a vendor with a blocked MCC.
- To make payment on "open" accounts maintained with vendors. The P-Card shall only be used to pay one transaction at a time and cannot be used to pay the accumulated balance of an account.
- Payment of State and local taxes to the Department of Revenue.

FREQUENTLY ASKED QUESTIONS

Can I use the card for travel related expenses?

Answer: The card can be used for registration fees and airline tickets. **You may NOT use your card to pay for food, lodging, parking fees, tolling fees, gas or any other travel related expenses.**

Cards may be used for **Emergency Purchases** (imminent threat to life or limb) only when a disaster or a life threatening situation has occurred, which requires an immediate purchase of goods, services or supplies and **MUST** be authorized by the President of the College.

Can I use the card to purchase items on the Internet?

Answer: Yes, but make sure that you print out your shopping cart/receipt. Once the order is received, attach the packing slip to the receipt and attach both to your monthly statement before forwarding to your Account Coordinator for reconciliation.

Can I use the card to place orders via telephone?

Answer: Yes, but make sure the vendor faxes or emails you a confirmation to be used for a receipt.

What should I do if my card is declined?

Answer: Call the Procurement Card administrator at 843-349-5207. The administrator will immediately contact the bank and determine the reason for the decline. If the decline is resolved, the vendor can obtain a manual override for that particular transaction.

What if I lose a receipt?

Answer: Contact the vendor for another receipt. As a last resort if no receipt can be obtained, create a receipt, documenting the situation, list the items that were purchased (include the vendor name, charges and date of purchase). Sign the receipt and obtain your department head's signature on the receipt. Attach the document to your monthly statement, forward to your Account Coordinator for account reconciliation.

What are the limits on my card?

Answer: Horry-Georgetown Technical College default limits are \$999.99 per transaction and \$2500.00 per month.

ATTACHMENT #9

HORRY GEORGETOWN TECHNICAL COLLEGE Request for Purchasing Card

Last updated January 2020

In order to receive a Horry Georgetown Technical College Purchasing Card (P-card) you must be a full time employee. This form must be completed, signed and forwarded to the Procurement Office. Once this application has been received and approved, the card will be ordered from Bank of America. The designated departmental supervisor and cardholder will be contacted when the card arrives. Card holder will be asked to review the SC State policies for use of the P-card. This information is accessible via a brochure provided by the College's Procurement Department. Maximum transaction limits are \$999.00 per purchase and \$2,500.00 per month for each card. On occasion, considerations will be made for an increased allowance if justified by the Purchasing Manager. **This card is never to be used for food or travel.** **Never have your order ship to your home address. Orders must only ship to a valid College address.**

Date: _____

Department: _____

Cardholder's Name: _____

Cardholder's SS # _____

Cardholder's HGTC ID#: _____

Cardholder's HGTC Address: _____

(Include Bldg. No. and Room No.)

Cardholder's Campus Phone #: _____

Cardholders E-mail Address: _____

Default Banner Org. # and Account # _____

To be assigned to card: _____

Signature of Card Holder Date

AVP, Dean or Department Manager Date

Procurement Manager Date

VP Finance and Business Affairs Date

To Be Completed By Purchasing

Account Coordinator's Name	
Account Coordinator's Campus Phone Number	
Account Coordinator's e-mail Address	
Transaction Limit - \$ 999.99	Monthly Limit - \$ 2,500

ATTACHMENT C

The P-Card is to be used only to make purchases at the request of and for the legitimate business benefit of Horry Georgetown Technical College.

The P-Card must be used in accordance with the provisions of the P-Card Program State Guidelines and in accordance with the P-Card policies and procedures established by the College.

Violations of these requirements may result in revocation of use privileges and/or disciplinary action, up to and including termination of employment. Employees who are found to have inappropriately used the P-Card will be required to reimburse the College for all costs associated with such improper use.

Please note that the SC State Comptroller General's Office publishes a website called SC State Transparency Spending Report. This report shows all State employee P-Card holders names and detailed transactions on a monthly basis. Please be mindful of your expenditures as it will appear on this report.

Cardholder Name: _____

P-Card Number: _____

Expiration Date: _____

Transaction Limit: \$999.99

Monthly Credit Limit: \$2,500.00

If transaction limits or monthly limits exceed the maximum limits allowed by the State, what is the justification for need: Not Applicable

I have read and will comply with procedures outlined in the P-Card Manual.

_____	_____
Cardholder Signature	Date
_____	_____
P-Card Administrator	Date

HORRY GEORGETOWN TECHNICAL COLLEGE
Walmart Card Use
Approval Form

In order to use a Horry Georgetown Technical College Walmart Card you must have your Department Manager's approval. This is a one-time approval. Complete the requested information below, sign and forward to the Procurement Manager. Once this application has been received and approved, your name will be entered onto a log that will be kept on file in the Procurement office.

Date: _____

Department Name and Org. Number: _____

Card Requestor's Name: _____

Signature of Card Holder	Date	AVP, Dean or Department Manager	Date
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The Walmart card is to be used to make purchases from a local Walmart store. It must be for the legitimate business benefit of Horry Georgetown Technical College. **Absolutely no Alcohol or gift cards are to be purchased with this card.** There is a **\$250 limit on each purchase.**

The Process for use of the Walmart card –

1. Approved users will contact the Procurement Office on the Conway Campus, Philip Lance on the Georgetown Campus and Michelle Sartori on the Myrtle Beach Campus.
2. User will take card to Walmart, pick up and pay for supplies.
3. User will immediately enter into Banner a detailed requisition for the supplies purchased from Walmart.
4. User will write the requisition number on the receipt and sign the receipt, then return the receipt with the Walmart card to the person they picked up the Walmart card from.
5. Forward all original receipts to the Purchasing Department for processing into a purchase order within 48 hours of picking up supplies.
6. Purchasing will send receipt and copy of purchase order to Accounting for payment.
7. **This process needs to be performed in a quick, efficient manner to insure prompt payment.**

Violations of these requirements may result in revocation of use privileges and/or disciplinary action, up to and including termination of employment. Employees who have inappropriately used the Walmart card will be required to reimburse the College for all costs associated with such improper use.

ATTACHMENT #11

<p>HORRY GEORGETOWN TECHNICAL COLLEGE</p> <p>FSI Online Ordering</p> <p>Approval Form</p>

In order to use the Horry-Georgetown Technical College FSI Office Online Ordering System you must have your Department Manager's approval. This is a one-time approval. Complete the requested information below, sign and forward to the Procurement Manager. Once this application has been received and approved, your name will be entered onto a log that will be kept on file in the Procurement office. If you order for more than one department, fill out a separate form for each one.

Date: _____

Department Name and Org. Number: _____

FSI Office Requestor's Name: _____

_____	_____	_____	_____
Signature of Requestor's Name	Date	AVP, Dean or Department Manager	Date

The FSI Office Online Ordering System is to be used to make purchases for office supplies only. It must be for the legitimate business benefit of Horry Georgetown Technical College. No single line item over \$500 can be ordered.

The Process for use of the FSI Office Online website –

1. Approved users will place orders on the www.fsioffice.com website. To access the website you will be given a user ID and a password sent to you by FSI.
2. All orders are to be placed on Tuesday of each week. Emergency orders will be allowed.
3. You must make sure the department account code you are ordering for, shows on the order to make sure it gets charged to the correct department.

Violations of these requirements may result in revocation of use privileges and/or disciplinary action. Employees who have inappropriately used the FSI Office Online website will be required to reimburse the College for all costs associated with such improper use.

ATTACHMENT #12

PROCUREMENT VIOLATION RATIFICATION

Vendor:
Date:
Employee:
Value:

Unauthorized (Illegal) Procurements: 19-445.2015. Ratification.

A. Upon finding after award that a State employee has made an unauthorized award of a contract or that a contract award is otherwise in violation of law, the appropriate official may ratify or affirm the contract or terminate it in accordance with this section. The contract may be terminated and reasonable termination costs, if any, may be awarded as provided in this section. The contract may be ratified and affirmed only if it is in the best interests of the State. The decision required by this subsection A may be made by the chief procurement officer, the head of a purchasing agency, or a designee of either officer, above the level of the person responsible for the person committing the act. If the value of the contract exceeds one hundred thousand dollars, the chief procurement officer must concur in the written determination before any action is taken on the decision.

B. All decisions to ratify or terminate a contract shall be supported by a written determination of appropriateness. In addition, the appropriate official shall prepare a written determination as to the facts and circumstances surrounding the act, what corrective action is being taken to prevent recurrence, and the action taken against the individual committing the act. Any governmental body shall submit quarterly a record listing all decisions required by subsection A to the chief procurement officers. A copy of the record shall be submitted to the board on an annual basis and shall be available for public inspection.

The HGTC Director of Procurement shall prepare a detailed explanation stating the corrective action being taken to prevent reoccurrence as well as the action to be taken against the individual responsible for the unauthorized procurement, documents that the price is fair and reasonable, and routes it through the VP for Business Affairs for approval. Once the VP for Business Affairs has reviewed and ratified this unauthorized procurement, the PO is created that is then filed with Accounts Payable department at which time a payment can be processed to the vendor.

Violation:

Justification

Corrective Action and Ratification to be taken:

Director of Procurement

Division Dean/Department Mgr.

Vice President

Employee

I APPROVED THE RATIFICATION OF ABOVE LISTED PROCUREMENT VIOLATION.

Harold H. Hawley-VP Business Affairs

DATE



ENTERPRISE RENT-A-CAR

DATE REQUESTED: _____

SELECT YOUR VEHICLE: Click on the box

- Premium Sedan
- SUV
- 12 Passenger Van
- Mini-Van

DESTINATION: _____

DRIVER'S NAME: _____

DATE OF BIRTH: _____ LICENSE NO: _____ STATE: _____

ORGANIZATION NO: _____ ACCOUNT NO: 7303

DEPARTURE DATE: _____ TIME: _____ AM PM

RETURN DATE: _____ TIME: _____ AM PM

CAMPUS PHONE NO: _____ CELL PHONE NO: _____

ADDITIONAL DRIVERS: YES NO

1. DRIVER'S NAME: _____

DATE OF BIRTH: _____ LICENSE NO: _____ STATE: _____

2. DRIVER'S NAME: _____

DATE OF BIRTH: _____ LICENSE NO: _____ STATE: _____

PROCUREMENT USE ONLY: GAS CARD NO: _____

NOTE: VEHICLE KEY, GAS CARD AND GAS RECEIPTS MUST BE TURNED IN TO PROCUREMENT OFFICE ON OR BEFORE 8:00AM. THERE WILL BE A CHARGE FOR VEHICLES NOT CANCELLED PRIOR TO THE VEHICLE DELIVERY DATE OR IF VEHICLE KEY IS NOT TURNED IN BY THE NEXT BUSINESS MORNING. PLEASE E-MAIL CANCELLATIONS TO timothy.wall@hgtc.edu

ATTN: ENTERPRISE

DELIVERY DATE TO HGTC: _____ TIME: _____ AM PM

E-MAIL CONFIRMATION OF RE Reservation to Timothy.wall@hgtc.edu

rev.5/25/2021

2024 EMPLOYEE PROCUREMENT GUIDE

PURCHASING POLICY AND PROCEDURES

Horry-Georgetown Technical College is a state agency governed by state law. The Procurement, Receiving and Inventory, Print Shop, and Book Store Departments are centralized under the Procurement Manager. Policies and procedures are in accordance with the South Carolina Consolidated Procurement Code which governs the expenditure of all funds regardless of the source, unless specifically exempted.

GENERAL INFORMATION

ALL PURCHASES MUST BE AUTHORIZED BY THE PROCUREMENT OFFICE.

All contracts for goods and services that commit College funds, must be reviewed by the College President, CBO, or Procurement Manager. Shipments should not be made without receipt of a College purchase order and definitely not until a purchase order number has been provided.

IRS Form W-9 is required for all new vendors conducting business with Horry-Georgetown Technical College.

PROCUREMENT METHODS

REQUISITIONS:

All requisitions are to be entered into the College's Banner system. A requisition is a request to purchase and not an authorization to purchase. Only when a purchase order number has been assigned are you authorized to make a purchase. Any order placed before approval is considered to be a Procurement Violation and will be handled accordingly.

If you would like assistance in entering your requisitions, please schedule training with Procurement.

Paper requisitions are preferred when a bid is required and are used for grant and P-Card purchases.

SMALL PURCHASES

Orders for \$10,000 or less may be made without securing competition, if the prices are certified as being fair and reasonable by the purchaser. These purchases require an HGTC purchase order.

Approval limits for purchases are:

Up to \$1,000.00	Requestor, Department Head, Finance
\$1,000.01 to \$1,999.99	Add Academic Dean
\$2,000.00 to \$9,999.99	Add Vice President
\$10,000.00 and above	Add President

CAPITAL EQUIPMENT

When purchasing any single item that is \$5,000 or greater, it needs to follow the special rules for "Equipment" purchases. This insures that funds are available, gives Cabinet the opportunity to review and approve or disapprove of the purchase as well as alert that an asset tag needs to be affixed to the item. It is also the time to review if there are any facility or IT infrastructure needs associated with the purchase. A "New Equipment" document can be found on the Procurement web page or Employee card in myHGTC.

PROCUREMENT CARD PURCHASES

If your job requires you to have a P-Card, please contact the Procurement Manager.

WALMART & FOOD LION PURCHASES

Walmart and Food Lion cards are available for use on purchases of \$250 or less. In order to use a Walmart or Food Lion card, you must be pre-approved by your supervisor by filling out a document found on the Purchasing web page.

FSI OFFICE SUPPLY PURCHASES

All office supply purchases must use the SC State Procurement Contract with FSI. You must be pre-approved by your supervisor by filling out the FSI document found on the Purchasing web page. Orders are placed on Tuesdays and have a \$500 limit on each purchase. IT equipment and furniture must go through Procurement and shall not be ordered online.

LOGO'D APPAREL AND PROMOTIONAL ITEMS

- P-Card purchases are not allowed.
- Logo must have Marketing approval.
- State funds are not allowed to be used to purchase logo'd apparel for employees. There are a few exceptions that can be found in the Expenditure Guidelines for Promotional and Marketing Items and Apparel, located on the Purchasing web page.
- Contact Purchasing for all quotes.

SHIPPING INSTRUCTIONS

Only valid College addresses are to be used for shipments. It is a procurement violation to use home addresses.

INVOICING

All invoices must be sent to accountspayable@hgtc.edu. Invoices without a purchase order number shall be considered unauthorized and may not be paid.

FORMAL BIDDING CONDITIONS AND INSTRUCTIONS

Types of Bids For Equipment, Services, or Supplies with Combined Cost Over \$10,000:

- Competitive Sealed Bid (IFB) – State Preferred Method
- Competitive Fixed Price Bidding
- Competitive Best Value Bidding
- Competitive Online Bidding
- Competitive Sealed Proposals (RFP)

2024 EMPLOYEE PROCUREMENT GUIDE

continued

SOLE SOURCE PROCUREMENT

When an item is available from only one known source and exceeds \$10,000 an order may be placed without competitive bids if sufficient, written justification is provided and sent with the requisition. There is a special form available on the Purchasing web page for this purpose. Before an order can be released, Procurement must verify and approve the purchase as a sole source.

EMERGENCY PROCUREMENTS

For emergency purchases, repairs, or other situations where it is not practical to prepare an order in advance, Procurement can place order for you. All emergency purchases must be approved by the President of the College. Please note that failure to plan ahead is not justification for an emergency order.

PREPARATION OF BIDS

For all orders that require a formal bid (where total value of supply or service exceeds \$10,000 either in a single year or in a total of a 5-year contract) the Purchasing department will prepare the formal bid document, post bid in SCBO as well as the Purchasing web page, receive quotes, bids or proposals from vendors and review for award. Awards will be made per state Procurement laws. The requesting department will be responsible for obtaining an approved requisition for the estimated amount, complete specifications that allow for competitive vendor bidding, and a list of preferred vendors. Once this information is presented to the Procurement department, we will handle your procurement. Please note that this process usually takes 4-6 weeks. It is in your best interest to include the Procurement department in the beginning if you are seeking vendors for demonstrations.

MINORITY BUSINESS ENTERPRISES

The College fully supports the efforts of the Governor and the State Legislature to assist minority-owned businesses to develop as part of the state's policies and programs which are designed to promote balanced economic and community growth. Therefore, the College wishes to ensure that those businesses owned and operated by minorities in the State of South Carolina are afforded the formal bid opportunity to participate fully in the overall procurement process.

GRATUITIES/ETHICS

Employees of Horry-Georgetown Technical College are prohibited from accepting gifts, meals, trips, rebates, or any promise of future reward or compensation or any other article and/or object of value from a vendor, although the intent of such a gesture may be honorable or a customary practice of the vendor. It is suggested that these gratuities be directed in cost savings to our solicitations for benefit to the entire College. The College has adopted the National Institute of Governmental Purchasing Code of Ethics.

TRAVEL AUTHORIZATION

Appropriate signatures/approvals are required before registrations or hotel accommodations can be processed. (Travel Authorization Request forms are available on the college website).

RENTAL CAR SERVICE

The College has a State contract with Enterprise. If you need to rent a car, please fill out the Rental Car Request Form located on the Purchasing web page and forward to Procurement at least 1 week in advance. Rental vehicles for Conway Campus will be delivered to Procurement where you can pick up the key and a gas card. For rental vehicles at Grand Strand and Georgetown Campuses contact Procurement. You must have a valid driver's license to rent a car for College business.

CONTACT INFORMATION

Procurement Manager

Dianna Cecala 843-349-5207

Procurement Specialist

Toni Richardson 843-349-7830

Timothy Wall 843-349-7858

Receiving/Inventory

Richard Kirchmeyer 843-349-5338

Receiving Clerk

Arthur Gray 843-349-7846

Print Services

Patricia Kasko 843-349-5346

Mark Bender 843-349-5236

Larry Peebles 843-349-3686

WEB ADDRESS

www.hgtc.edu/purchasing

PHYSICAL ADDRESS

Conway Campus

2050 Hwy 501 E

Building 100, Room 120

Conway, SC 29526

MAILING ADDRESS

PO Box 261966

Conway, SC 29528-6066



Process for Business Travel

Forms for use:

Rental Car Request Form – Go to www.hgtc.edu/purchasing >Procurement Guides and Forms

Expense Form – Located in myHGTC>Employee Resources>Employee Info and Forms>Business Affair and Finance

Travel Authorization Form - Located in myHGTC>Employee Resources>Employee Info and Forms>Travel and Field Trips

Paper Purchase Requisition Form – Located in myHGTC>Employee Resources>Employee Info and Forms

Fill out a Travel Authorization form and paper requisition and obtain all signatures before making any reservations. Out of State Travel requires you to be pre-approved by the President.

Please be familiar with the HGTC Travel Policy 2.2.1 & 2.2.2

1. Reserve a car at least 2 weeks in advance using the *Rental Car Request Form*

- a. Fill out, print, sign, and send to timothy.wall@hgtc.edu and toni.richardson@hgtc.edu
- b. Procurement will order the car to be delivered in time for your trip.
- c. You must pick up the keys and gas card from the Procurement office.
- d. Bring the keys and gas card back to Procurement office by 8:00 a.m. following your return.
- e. If returning after hours, there is a drop box on the outside of Bldg. 200 west, side entrance.
- f. The car must be filled up with gas and the receipt must be turned in with gas card.
- g. If you need to rent a car after flying to a city, it will be done at your own expense. Uber and taxi services are permissible. These charges may be eligible for reimbursement at the most current State guidelines rates.

2. Pay for your registration

- a. You're allowed to use your p-card to pay for registration. If you do not have a p-card, a Purchase Order can be used and a check will be mailed, or the procurement office can use their p-card to make payment as long as you provide them with an authorized requisition.

3. Hotel reservation

- a. You may make your own reservation and hold it with your p-card, but never pay with your p-card.
- b. The Procurement office will make the payment for you via the Travel p-card. The State has authorized the use of p-card payment only by the Procurement office. Other department p-cards can't be used.
- c. Fill out a paper requisition and travel request and obtain the proper signatures. Send to Tim Wall or Toni Richardson at least 2 weeks prior to your date of stay. Include all pertinent information.
- d. You will be emailed your confirmation information.

4. Airfare and reservations

- a. Air Travel reservations must be made by the Procurement office. To help you with your reservations you must supply us with a fully executed paper requisition and travel request. You may prefer to meet with procurement in-person to assist with the flight details.

5. Food

- a. If your travel does not require you to spend the night, there will be no reimbursement for food.
- b. If you do have to spend the night, food will be at your own expense, and you will be reimbursed at the most current State guidelines. To obtain your reimbursement, fill out an expense form and submit for signatures.

6. The State asks us to travel as economically as possible

- a. If your conference is in a hotel, try to stay in the same hotel to avoid the need to travel to and from your conference.
- b. The State does not allow employees to tip. If a tip for service seems appropriate, please do so at your own expense.