Catholic Charities Disabilities Services	
Agency Standard and Procedure	
Standard Category	Administration
Standard Title	Purchasing
Regulations	
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Standard:
Catholic Charities Disabilities Services (CCDS) recognizes its fiduciary responsibility to expend funds and make purchases in a manner that is fiscally responsible and is in compliance with all pertinent rules, regulation and law. The purpose of this standard is to establish procedures for the purchase of goods and services.

CCDS requires full and open disclosure when dealing with purchasing. CCDS staff and board members must avoid any conflict of interest or the appearance of a conflict of interest. CCDS staff and board members must at all times provide full disclosure of their actions or relationships with prospective vendors, contractors, or consultants.

Definitions:

1) *Buyer*: any CCDS employee authorized to make purchases for the agency.
2) *Cost Analysis:* evaluation of the separate elements that make up a vendor's total bid to determine if they are allowable, directly related to the purchase under consideration, and reasonable for the value received.
3) *Price Analysis:* comparison of prices from multiple sources, such as established catalogue or market prices, or prices for similar past purchases.
4) *Single Source Vendor*: a vendor chosen by the buyer outside of normal purchasing procedures for a specific reason, even though alternative vendors may be available.
5) *Sole Source Vendor:* a vendor chosen by the buyer when there is no other vendor capable of fully and reasonably meeting the requirements of the purchase.

Procedure:

1) Employees must at all times provide full disclosure of their actions or relationships with prospective vendors, contractors or consultants (see CCDS Conflict of Interest Disclosure Standard). Employees shall not engage in conduct resulting in a real, potential or apparent conflict of interest. A conflict of interest may arise when any action by a CCDS employee or board member, whether isolated, recurring, or continuous, is to the direct financial advantage of the employee or board member, of their spouse, parent or child.

2) Buyers are expected to make all purchases in a manner which ensures that CCDS receives the best quality goods and services for the best price reasonably available.

3) Only goods or services that are necessary in the course of CCDS operations will be purchased.

4) Purchases may be made from a sole source when there is no other vendor capable of fully and reasonably meeting the requirements of the purchase.

5) Purchases may be made from a single source when an emergency exists in which harm might result from any delay caused by following regular purchasing procedures.

6) Where appropriate, an analysis will be made of lease and purchase alternatives to determine which type of acquisition which would be the most economical and practical.

7) For purchases in excess of $500.00, price analysis will always be performed and documented. At least 3 verbal or written quotes will be obtained. Internet price lists and catalogue listings can be considered quotes. The date and source of the quote will be documented. This documentation will be attached to the purchase receipt. In some cases, price will be the deciding factor however, quality of the item, product or service to be purchased will be taken into consideration.

8) Under certain circumstances, cost analysis also needs to be performed and documented. Cost analysis is always required if payment is based in whole or in part on reimbursement of costs. All vendor quotations must be evaluated on the basis of product quality, total compliance with specifications, total cost, and the vendor's acceptance of cost and conditions.

9) For purchases anticipated to be in excess of $5000.00, three (3) written quotes will be obtained. Vendors will be solicited either by letter or email. The solicitation will provide selected vendors with the same description of the specifications and technical requirements for the good or service. Written quotes may be received by mail, fax, or email and should be signed or emailed by an authorized representative of the vendor. This documentation will be attached to the request for, or documentation of, the payment for services. In some cases, price will be the deciding factor however, we will also take into consideration quality of the item, product or service to be purchased. At their discretion, the Executive Director or Designee may choose a vendor without obtaining three quotes.

10) Purchases of less than $500.00 will not require prior approval. A buyer will obtain prior approval from their department Director for all purchases costing between $500.00 and $1,000.00. For purchases exceeding $1000.00, a buyer will obtain prior approval from their Department Director, the Director of Finance, and the Executive Director, or designee. All prior approvals will be documented.

11) As part of the prior approval process for purchases in excess of $1000.00, the department Director will verify with the Director of Finance, the Executive Director, or designee, that funds are available to cover the purchase and that the payment provisions are reasonable.

12) All source documents supporting any given transaction will be retained as required by the record retention standard. For purchases in excess of $500.00, this documentation must be sufficient to establish the basis for selection, cost, rationale for purchase, and payment.

Standard: *Purchasing, 2014.01.21.*