

Purchasing Process

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| Effective Date: | 2-6-25 |
| Revised Date: | 2-6-25 |
| Issuing Authority: Chief Probation Officer | |

417.1 PURPOSE:

To establish guidelines for purchases of goods and/or services as part of the general operating expenses provided for in the County budget.

417.2 DEFINITIONS:

Requestor: Any employee, volunteer, temporary employee, or affiliated individual working under the scope of the Probation Department.

Staff Request "Green" Form: A form used to describe, justify, and approve the purchase of goods and/or services.

Procurement Card: Commonly referred to as Cal-Card.

Food Services Catering Request Form: A form used for requesting the preparation of food goods for a probation event or function.

Food Services Supplies Request Form: A form used for requesting a variety of bulk food goods or supplies.

417.3 GUIDELINES:

- A. When a County contract exists for supplies and/or services, that contract must be utilized. For instance, the County maintains pre-bid and approved contracts for office supplies, paper and plastic products, and similar items. Check with the Department Fiscal - Purchasing if you have any questions.
- B. Under no circumstances may staff agree to, verbally approve or sign, any agreement (contract, purchase order, MOU, etc.) on behalf of the Department. Any purchase or agreement requiring a signature must only be approved and signed by the Chairperson of the San Bernardino County Board of Supervisors, County Purchasing Agent, or their designees. (See County Policy 11-06 – Contract Standards).
- C. The San Bernardino County Board of Supervisors have approved an agreement to provide for procurement (credit) card services, which allows the cardholder to sign for a purchase that meets all the requirements as set forth in County and Department policy and procedure.
- D. Procurement Card purchases must follow Department and County Procurement Card procedure requirements.

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- E. The minimum amount of time required for processing requests, excluding holidays and weekends, is fourteen (14) business days. Additional time or approvals may be required dependent on the specific requirements for any given request.

417.4 RESPONSIBILITIES:

Good and Services Purchases:

- I. Requestor:
 - A. Complete Staff Request "Green" form in its entirety for all purchases of goods or services.
 - 1. All sections must be completed fully to document the County purpose for the expense.
 - 2. The Description and Justification sections must provide sufficient information to clearly identify "what" is needed and "why" County funds are being expended.
 - B. Acquire and attach at least three (3) competitive quotes to the Staff Request "Green" form from approved vendors except when a County contract exists for supplies and/or services (E.g. ordering office supplies: pens, paper, staples, etc.), that contract must be utilized, and the quotes are not necessary.
 - 1. The quotes can be informal (obtained over the phone or internet with appropriate identifying information to include company, description of item, and amount).
 - 2. The quotes must be of same items and/or services. If it is not practical to obtain three quotes, the requestor must articulate why it is not practical and include that documentation with their request form.
 - C. Submit the Staff Request form and quotes to the appropriate Supervisor/Division Director.
 - D. For food services, refer to the Food Services Purchases section.
 - E. Contact the Department Fiscal/Purchasing Unit for any questions at [REDACTED].
 - F. Submit Approved invoice, packing slip, and backup documentation to Fiscal – Payables for processing.
- II. Supervisor and Division Director:
 - A. The immediate Supervisor shall review all documentation, sign, date, and forward to next supervisor(s) in chain of command, ultimately securing the Division Director's approval.
 - B. The Division Director must review all documentation, then sign and date the Staff Request form.
 - 1. If the total purchase amount of a request is \$5,000 or higher, the request requires approval by the Deputy Chief Probation Officer of the requesting unit.

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- C. Once all signatures are completed, forward the Staff Request form to the Fiscal/Purchasing Unit.

III. Department Fiscal – Purchasing Unit:

- A. Verify that all necessary documentation and signatures are included with the "Green" request, and follow-up with the requestor's Supervisor/Division Director/DCPO as appropriate to secure all required information.
- B. Scan all documentation into the Probation's purchase request system, complete all appropriate fields in the system, and assign the request to Finance in the system.
- C. Finance:
 - 1. Review and assign Cost Center/General Ledger (G/L) Account Codes within the purchase request system and assign to the appropriate parties within the system.
 - (a) Assign computer-related requests to Automated Systems for review, check of inventory and/or quotes, and approval of system compatibility, when applicable.
 - i. If the request requires Automated Services to purchase items, Automated will assign request to Accounts Payable in the system.
 - (b) Assign facilities/maintenance-related requests to Maintenance for review, completion of request, and/or quotes.
 - i. If the request requires Maintenance to purchase items, Maintenance will assign request to Accounts Payable in the system.
- D. Determine payment method based on the information for the specific request utilizing the County Procurement Manual.
- E. Complete all necessary fields within the purchase request system.
- F. Input the invoice, packing slip, and backup documents into the system.

Food Service Purchases:

- I. Requestor:
 - A. For a Food Service Catering Request, contact the Food Services Manager and ensure Food Services can accommodate the request. If so, complete a Food Service Catering Request form.
 - 1. A Supervisor/Director must review all Food Service Catering Requests, sign, date, and contact the Finance Division (Payables/Purchasing/Budgets) for review and approval of funding source, if necessary.
 - 2. Deputy Chief Probation Officer must review all Food Service Catering Requests, sign, date, and forward to Food Services.

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3. Maintain, for three (3) years, a signed roster of all attendees, an agenda, or documentation clearly identifying the purpose of the event.
- B. For Food Service Supply Requests, complete and submit the Food Service Supply Request form.
1. Complete form(s) in its entirety for all purchases of prepared and/or prepackaged goods, regardless of method of payment or type of procurement.
 2. Signed by a Division Director II if the request is cumulatively less than \$500.00, anything over that amount requires a DCPO signature.
 3. Pick-up items upon notice from Food Services.
- II. Department Food Services:
- A. Verify that all necessary documentation and signatures are included with the Food Service Catering Request form and/or Food Service Supply Request form, and follow-up with the requestor as appropriate to secure all required information.
 - B. Complete purchase request and contact requestor for pick-up of order, or contact Requestor indicating inability to fulfill request, and provide alternatives if possible.
 - C. Submit approved invoice, packing slip, and backup documentation to Fiscal – Payables for processing.