
POLICY: **PURCHASING POLICY**

EFFECTIVE DATE: **JUNE 26, 2019**

REVISED DATE: **JUNE 26, 2019**

APPROVAL DATE: **NOVEMBER 5, 2021**

DEFINITIONS

Goods:

Tangible and transferrable merchandise or possessions.

Members:

All voting members of the Associated Students, Inc. of California State University San Marcos (ASI) Board of Directors members, employees, and volunteers.

Services:

A transaction in which no physical goods are transferred from a seller to the buyer.

Information Technology:

Hardware, equipment, software, and subscriptions. These may be application or web based.

PURPOSE

The purpose of this policy is to establish policies and procedures for ASI purchases made by ASI members.

POLICY

- I. ASI supports a purchasing environment that recognizes the unique purchasing needs of the organization and its operations. This policy outlines how to purchase goods, services, and information technology as needed to meet these unique purchasing needs in a timely, efficient, and cost-effective manner.
- II. When making purchases, all things being equal such as quality, specifications, service, and product availability, choose the lowest cost, local vendors, sustainable and/or recycled materials.
- III. When buying in large volume or bulk, utilize established California State University, University and/or other Auxiliary purchase agreements when feasible.
- IV. All purchases must be within the allocations of the current Annual Budget approved by the ASI Board of Directors.

PROCEDURE

- I. Purchasing Limits and Requirements
 1. Reference California State University San Marcos (CSUSM) Procurement Guidelines for Goods, Services, and Information Technology Tips for Making Purchases.
 2. Refer to the ASI Hospitality Policy and follow when applicable.

II. Types of Purchases Goods:

1. When applicable, follow the ASI Hospitality Policy.

- a. Upon delivery and receipt of tangible goods over \$5,000, the purchase is tagged by ASI. CSUSM Accountant then enters the item into the asset portion of the financial system.

2. Services:

- a. Complete ASI Contract Agreement via the ASI Contract Request Form
- b. Once request is received, Designated ASI Professional Staff member will facilitate completion of Contract Agreement
- c. Agreement will when be routed to ASI Executive Director or Designee for signature by Designated ASI Professional Staff member
- d. Upon receipt of fully executed Agreement, Designated ASI Professional Staff member will email completed Agreement to all parties and file.
- e. Refer to ASI Accounts Payable Policy for payment processing.

3. Information Technology:

- a. Hardware and Equipment: Complete CSUSM Technology Order Request process.
- b. Software and Subscriptions: Complete CSUSM Information Technology Review Form (ITR) and follow guidelines. Once approved, purchaser may complete purchase.

RELATED DOCUMENTS

I. CSU Chancellor's Office Procurement and Contracts Policy:

<https://calstate.policystat.com/policy/7865355/latest/>

II. CSUSM Technology Order Request Form:

<https://www.csusm.edu/iits/trp/order.html>

III. CSUSM Information Technology Request Form:

<https://itservicecatalog.csusm.edu/service.php?id=64>

IV. CSUSM Procurement and Contracts: <https://www.csusm.edu/procurement/procurementservices/index.html>

V. CSUSM Purchasing: <https://www.csusm.edu/procurement/procurementservices/purchasing/index.html>

VI. CSUSM Goods, Services, and Information Technology Tips for Making Purchases:

<https://www.csusm.edu/procurement/procurementservices/purchasing/goods.html>

VII. CSUSM Insurance Requirements:

https://www.csusm.edu/procurement/documents/procurementdocs/general_insurance_requirements.pdf

VIII. CSUSM Procurement and Contracts Guidelines:

<https://www.csusm.edu/procurement/procurementservices/index.html>

IX. ASI Policies

https://www.csusm.edu/asi/about/corporate_documents/policies_and_procedures/policies_and_procedures.html