CTE P1 - Equipment Purchase Procedure Under Strong Workforce or Perkins Grants – 08/24

1. The department chair and faculty work with their instructional dean to create projects that meet the objectives of the Perkins and Strong Workforce grants using the application provided by the CTE Office in the Spring semester of each year. The instructional dean ensures that:
    - The equipment request is entered in the unit plan.
    - The equipment requested is allowable, allocable, and reasonable.
    - If applicable, 3 quotes from different vendors are attached if equipment is over $15,000.
    - If applicable, the goods and services are approved by the Board of Trustees for amounts over $114,500. Note that bids will be required in this case.
    - If applicable, section 508 compliance is obtained – Reference AP6365.
2. Once completed, the application is sent to the CTE Office by the end of the Spring Semester preceding the grant award year.
3. The application is reviewed by the CTE Office, comments are made as needed, and the application is sent to the Academic Affairs Office for VP approval. The application can be approved, partially approved, or denied.
4. In years when requested funding exceeds available funding, the instructional dean allocates funding to the projects in their division in the most equitable way possible after they receive their final allocation from the VP.
5. After the CTE office receives the allocations from the instructional dean, applications are returned to the appropriate department chairs and instructional deans. The final budget approved amount is indicated.
6. Department chairs and faculty revise their investment plan and work plan objectives if they are significantly altered (note that this information is uploaded in the chancellor's office NOVA system and needed by the CTE Office). The funding cycle can start.
7. For equipment requests, division offices obtain revised quotes if needed, a W9 form if a new vendor is selected, and enter their requisitions in the LACOE BEST system. Due to a shortcoming of that system, the division office also sends the dean's signed requisition via Adobe Sign PDF to the CTE office to ensure proper audit trail approval.
8. The CTE Office checks the requisition for compliance to the grant requirements and the application.
9. The CTE Office Career Technical Education Coordinator and the CTE Project Manager approve the requisition in LACOE BEST.
10. For some items, Public Affairs or Information Technology approve the requisition in LACOE BEST (Division offices can check the progress of the requisition in LACOE BEST workflow) – Reference AP3720 & AP3070.
11. Purchasing Department receives the approved requisition.
12. Purchasing Department sends the vendor a purchase order (Division offices can check the progress of the requisition's transformation in a Purchase Order in LACOE BEST).
13. Equipment is shipped by the vendor to the campus warehouse. In some cases, a heavy equipment moving contractor needs to be hired to install newly acquired equipment. Communication and

coordination with these contractors should happen as early as possible. It is best if these costs are included with the procurement of the equipment

14. Equipment is received and end user checks off the receiver (yellow form)
15. Equipment is subsequently tagged by purchasing if its value is above $1,000 and kept in the college's inventory system. Capital equipment costing over $5,000 with a projected lifetime of 2 or more years is tagged and recorded – Reference AP6550
16. The vendor will likely send an invoice to accounts payable the moment they ship the equipment. Some vendors send it to the faculty who sought the original quote from the vendor, so it is important faculty forward that invoice to Accounts Payable.
17. The division office will sign off on the invoice once they get confirmation that the equipment was delivered undamaged and all ordered items accounted for/present.
18. Accounts Payable will pay the vendor as per the PO terms.
19. The process is finished