

I. POLICY and SCOPE

The purpose of this policy is to streamline and improve the process for selecting, replacing, and purchasing furniture, furnishings and accessories for all departments and locations. Items and services obtained are to be of high quality, at the lowest reasonable cost, meet or exceed the department's expectations for performance and availability at the time of purchase. Such purchases are to be made in compliance with State University of New York Construction Fund (SUCF) and SUNY Old Westbury (College) purchasing policies and standards.

This policy applies to College, Auxiliary Service Corporation, Old Westbury Foundation, Alumni Association, Student Government Association and personnel in other affiliated organizations housed in campus buildings desiring to buy new or replace furniture and related items.

II. RESPONSIBILITIES

All furniture purchases must be processed and pre-approved by the Assistant Vice President, Capital Planning and the Director of Purchasing to ensure a uniform standard and quality. All furniture purchased using College funds is considered College Property. College Property can be relocated at any time depending on the needs for such property allocation or distribution.

The major responsibilities for recommending, specifying, pricing, ordering, receiving and payment of all furniture, accessories and supplies, and furniture equipment at Old Westbury will be shared among the Requesting Department, the Capital Planning Office, the Purchasing Office, and the Facilities Department.

- A. **Requesting Department** - Initiates the request and designates a Project Manager (PM) to oversee the process through acquisition of the items purchased or services obtained. The PM acts as Departmental liaison to the other departments involved in the purchase, obtains vendor quotes (with assistance from the Purchasing Office and Capital Planning), identifies funding source and accounts to be charged, and in collaboration with the Facilities Department and Capital Planning, schedules the deliverables, arrival, and installation of the furniture, furnishings and accessories.

- B. **Capital Planning** – Is responsible for the consistent implementation of furniture purchase standards. The Assistant Vice President of Capital Planning oversees and coordinates the purchasing of College furniture and provides guidance to Departments on selection, pricing and ordering of such items. Departments should consult the Capital Planning if there are questions regarding furniture matters. The Assistant Vice President of Capital Planning or designee may prevent, based on legitimate business concerns, in whole or in part, the purchase of requested furniture, furnishing or accessories. Exceptions must be justified and approved in writing by the College's Chief Financial Officer.

- C. **Purchasing** - Upon receipt of an approved requisition from the Requesting Department showing the account number, Purchasing will create a purchase order (PO), encumber funds and deliver PO to vendor. Purchases are made according to New York State Procurement Guidelines which require utilization of minority, women, veterans and preferred source vendors when feasible.

- D. **Facilities** – Coordinates the delivery, movement and disposal of furniture with the Requesting Department and Capital Planning.

III. APPROVAL THRESHOLDS

Requests to purchase purchasing furniture, furnishings and accessories up to \$10,000 require approval of an Academic Dean or Administrative Department Head. Requests for purchases of \$10,000 or more but less than \$25,000 require approval by the Area Vice President. Requests of \$25,000 or more require dual approval of both the Area Vice President and the College's Chief Financial Officer.

IV. PROCEDURES

The following policy and sequence of events will apply to all requests for new furniture and related equipment, furnishings and accessories.

- A. Requesting Department must complete items I. through V. of the Furniture Request Form (Exhibit I) which can be found on the Capital Planning webpage. The Furniture Request Form should be submitted to Capital Planning for review prior to the purchase. Capital Planning will forward a copy of the Furniture Request Form to Purchasing for review.
- B. Capital Planning and Purchasing will assist Requesting Department by providing recommendations for selecting the furniture based upon functionality, availability, compatibility, pricing and the furniture purchasing standards and guidelines.
- C. Upon approval by Capital Planning and Purchasing, Requesting Department will be provided a copy of the Furniture Request Form along with options, a cost estimate and approval to proceed with the purchase.
- D. Requesting Department, in collaboration with Capital Planning and Purchasing, will obtain price quotes from vendors. If Requesting Department decides to continue the purchase it should return the Furniture Request Form to Purchasing with the appropriate departmental approval signatures noted in Section III and indicate the budget account to be charged.
- E. Purchasing will create a purchase order, encumber funds and deliver PO to the vendor.
- F. The Requesting Department will coordinate the acquisition of the goods or services with Purchasing and the vendor, and with Capital Planning and the Facilities Department for the delivery of the furniture.
- G. Facilities and the Requesting Department will be responsible for receiving and inspecting furniture during installation and delivery.
- H. Requesting Department should allow 8-10 weeks lead time from the time of purchase order created until the furniture order is received. Last minute, end of College budget cycle request may be denied or delayed on the basis of lateness and submitted in the next budget cycle.
- I. If the item is a major acquisition, the move, setup, disposal or removal if required, will be coordinated by Capital Planning.

V. OTHER FURNITURE CONSIDERATIONS

- A. Storage or Disposition of Furniture: If a Department decides it no longer needs a piece of furniture, it should be moved to storage or disposed of only through inventory control managed by Facilities via College Policy F-02, "Disposal or Sale of Equipment and Material". Furniture placed in storage

can be used elsewhere on campus and no longer belong to that Department. Departmental or College furniture located in offices not actively occupied may be relocated at the discretion of the Assistant Vice President of Capital Planning.

- B. Disposition of Furniture: Facilities will implement moves or disposals requested by Capital Planning. The Requesting Department should advise Facilities in advance if furniture is to be moved or disposed of to allow for the new items. Capital Planning must review any item to be moved or disposed of by moving to storage for use by other Departments or outright disposal by Facilities.
- C. Stored Furniture Requests for Usage: A Department can contact Capital Planning or Facilities to request used furniture from storage. If available, it will be moved by Work Order request.
- D. ADA Requirements: When new furniture is required as a result of an ADA accommodation, contact Capital Planning and that office will provide standard furniture options.
- E. College-wide or Reorganization Moves: If the College requires a Department or individual to move as part of a College-wide reorganization and if the current furniture does not fit or is not adequate in the new location, then Capital Planning may fund the move and purchase the new furniture. Ideally, a reorganizational move would require only moving personnel files and work necessities and not furnishings.
- F. Department Moves or Requests for Additional Furniture: If a Department wants an individual to move from one office to another or requires additional furniture, the Department is responsible for the move and additional furniture expenses. Furniture appropriate for the new location must be reviewed for approval by Capital Planning.
- G. Furniture Standards for Offices: SUCF has defined office space dimensions and furniture standards for various offices. Furniture standard for offices (broadly defined) with high public visibility (for example, President's, Vice Presidents', and Deans' offices and all staff within these immediate office areas as decided by the President, Vice-Presidents, and Deans if appropriate) require furniture that is agreeable in appearance and presentation value.

VI. REFERENCES

For additional guidance related to this policy please refer to:

- A. SUNY Office for Capital Facilities Guidance Document CLC – 9: Furniture, Fixture and Equipment Purchase: A reference guide for purchasing equipment with capital funds.
- B. Old Westbury Policy No. B-10, Procurement of Goods and Services.
- C. Old Westbury Policy No. F-01; Inventory Control over Property.
- D. Old Westbury Policy No. F-02, Disposal and Sale of Equipment and Material.

VII. REVIEW AND APPROVAL

This policy was prepared by the Division of Business & Finance and reviewed by the College's Assistant Vice President of Capital Planning, the Director of Purchasing, the Director of Facilities, the Associate Vice President for Business Compliance, and the Associate Vice President for Business Affairs and Controller prior to approval by the President.

FURNITURE REQUEST FORM

Instructions: All requests for furniture and accessories for existing spaces or facilities, requests for spaces that are currently not occupied by the requestor are to be submitted using this form. Please complete items I. through V. and forward this form to the Capital Planning Office. After review, Capital Planning will provide a cost estimate and return the form to you for appropriate departmental approvals and account to be charged.

I. Title of request: _____ II. Date of request: _____

III. Requestor or point of contact for questions: _____

IV. Request type:

- a. Select **one** of the following:
 - i. This is a request for new furniture/accessories for an existing space currently occupied by the requestor.
 - ii. This is a request for new furniture/accessories for an existing space NOT currently occupied by the requestor.
 - iii. This is a request for refurbishing/refinishing existing furniture for an existing space currently occupied by the requestor.
- b. Location of existing space:
 - i. Building: _____
 - ii. Room: _____

V. Description of request:

a. Scope of work:

b. Justification for request:

c. Consequences if this request is not completed:

VI. Funding:

- a. Capital Planning or Purchasing estimate the cost to be \$_____.
- b. It is the Requestor’s Department responsibility to fund the request. Funds are available in Account # _____.

VII. Approval signatures:

APPROVAL AUTHORITY	SIGNATURE	DATE
DEAN OR DEPARTMENT HEAD (IF < \$10,000)		
VICE PRESIDENT (IF ≥ \$10,000 BUT ≤ \$25,000)		
VICE PRESIDENT (IF > \$25,000)		
CHIEF FINANCIAL OFFICER (IF > \$25,000)		
CAPITAL PLANNING OFFICE		
PURCHASING OFFICE		