Contract Blanket Orders

I. A Contract Blanket Order (CBO) is an order issued to establish an account with a specific external vendor for a specified period for the purchase of similar supplies or services for which a contract has been established by competition or the bid waiver process (links to contract lists may be found in Procedure 3.3.8 – Contract Listing).

A. Definitions:
   1. A release is the purchase of one item or multiple items from the same vendor at one time.
   2. A release order is locally reproduced correspondence that is recommended for use as a method of maintaining written documentation of releases placed with vendors against blanket orders.

B. Limitations:
   1. A CBO may not be requested for less than $100.
   2. The CBO may not be for less than 30 days or for more than 12 months.
   3. CBOs utilizing all funds except 133 and 144 must expire June 30. CBOs utilizing funds 133 and 144 may overlap state fiscal year end but must expire on or before the end date of the funding source.
   4. Only one CBO to any one vendor may be issued per distinct departmental program (defined as individual responsibility center, grant or other distinct accounting entity established within a department).
   5. CBO purchases are limited to the items covered by the class code and terms and conditions outlined in the body of the blanket order and attachments.
   6. Releases may not be made against a CBO until the ordering department receives their copy of the order from Purchasing unless clearance has been received from the Purchasing Agent who is assigned the CBO.

C. Procedures:
   1. Prepare an external requisition in accordance with the instructions in Procedure 3.2.1 – Requisition Preparation.
      a. Indicate the beginning and ending dates of the CBO in the block provided on the requisition.
      b. Enter the description: "Contract Blanket Order for(description of product or service). Cite the contract number from the list of contracts found through Procedure 3.3.8 – Contract Listing or attach complete specifications for competitive bidding.
   2. Route the requisition through your normal approval channels to Pre-Audit in Accounting Services.
3. Provide copies of the resulting department copy of the CBO to any individual authorized to place releases against the order.

4. Maintain sufficient funds in the CBO to cover prospective purchases by encumbering such changes at the approving level within your division, school or college; or requesting such changes in writing or by email through your appropriate approving level within your division, school or college to Pre-Audit in Accounting Services. Refer to the existing requisition number in all correspondence.

5. The ordering department is responsible for tracing delivery on product or service not received and for product returns, replacements and credits for items received on CBOs.

6. Release order correspondence may be used to convey the release order to the vendor or simply as an internal record of the release order. If the release order is telephoned to the vendor, be certain that the vendor understands that the purchase order number must appear on the resulting invoice or that invoice will be rejected.

7. Requests for CBOs are subject to Pre-audit steps for appropriateness and other institutional approvals listed in Procedure 3.2.6 – Purchases Requiring Additional Approvals.

II. Requests for CBOs are subject to review, revision or rejection by Purchasing.
   A. Products and services requested are reviewed against offerings in current listings of certified minority businesses and licensed sheltered workshops in Procedures 3.3.1 – Certified Minority Owned Businesses and 3.3.13 – Certified Work Centers respectively, for the purpose of furthering the University's commitment to Affirmative Action.

III. Periodic trend audits of CBOs are performed by Purchasing to correct improper application of this procedure.
   A. Failure to comply with limitations of CBOs or failure to keep those orders adequately funded may result in withdrawal of the privilege to use such orders for the responsible departments.
   B. Failure to comply with limitations of CBOs subjects the responsible individual to the non-conforming purchase process in Procedure 3.2.4 – Non-Conforming Purchases.

Questions regarding Contract Blanket Order procedures should be directed to Purchasing.