

**SAM – PURCHASES (Cont.)**

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## **SAM – PURCHASES (Cont.)**

### **ITEM INSTRUCTIONS**

#### **MISCELLANEOUS ITEMS**

##### **WATER, BOTTLED DRINKING**

**3612**

(Reviewed 10/2014)

Building codes or health ordinances in most localities require that a building owner provide occupants a convenient source of good drinking water. It is the policy of the State to provide adequate facilities for cold drinking water from fountains connected to the building water supply. When an agency enters into or renews a lease, the lessor should, if possible, be required to provide adequate cold drinking water facilities at no cost to the State. Before entering into or renewing a lease, agencies will determine the fitness or palatability of available drinking water facilities.

Bottled drinking water may be purchased by the agency where it has been determined that the building water supply is not fit for human consumption or where the cost of connecting a drinking fountain to the building water supply renders it impractical. No other purchases of bottled drinking water will be made.

Where the building drinking water supply in existing State occupancies is so tepid as to render it unpalatable, consideration will be given to agency requests for the purchase of water coolers. Rental expense for water coolers is not authorized except in certain field conditions where potable water is not available.

##### **HEAVY EQUIPMENT**

**3615**

(Reviewed 12/12)

Agencies submitting purchase estimates for heavy equipment items of the type included in the Statewide Mobile Equipment Inventory will include a statement, on the purchase estimate, that the availability of surplus equipment for interagency purchase or rental has been investigated and no suitable equipment is available. Copies of the inventory can be obtained from the Office of Fleet Administration, Department of General Services, and Sacramento. See SAM Section [3522.1](#).

## SAM – PURCHASES (Cont.)

### ACQUISITION OF VEHICLES

3620

(Revised 02/2016)

*This information is now found under SAM section [4120](#).*

### TYPICAL FLEET VEHICLE

3620.1

(Revised 5/2015)

Typical fleet vehicles are two-door and four-door sedans with interior volume, passenger and luggage area combined, less than 110 cubic feet. Each agency's annual purchases that are powered solely by internal combustion engines utilizing fossil fuels, or that are powered by more than one source, such as a nonplug-in hybrid electric vehicles must average at least 38 Environmental Protection Agency combined city/highway mileage for passenger vehicles and 22.2 Environmental Protection Agency combined city/highway mileage for light duty trucks, vans and sport utility vehicles. The Director of General Services may adjust the average miles per gallon figure upward each year if examination of the mileage performance of vehicles that will meet the State's needs shows there will be at least two competing manufacturers that can meet higher mileage requirements. Colors shall be solar reflective (white, silver metallic or gold metallic) unless the department is granted specific approval to use a non-solar reflective color by the Department of General Services, Office of Fleet and Asset Management. The following preapproved exemptions do not require a written request:

- Vehicles over 8,500 GVWR
- Vehicles that are NOT rated for highway speeds (e.g.: Gator, electric cart)
- Authorized Emergency vehicles, as defined in [§165](#) of the Vehicle Code, that are equipped with emergency lamps or lights described in [§25252](#) of the Vehicle Code.

For additional information on Fuel Economy Standards see Management Memo ([MM](#)) [15-03](#)

## **SAM – PURCHASES (Cont.)**

### **SPECIAL PASSENGER VEHICLES**

**3620.2**

(Revised 9/85)

Elective constitutional officers and members of the Governor's Cabinet may be provided with the make and model of vehicle the officer deems necessary, equipped as they desire.

Vehicles other than types listed in SAM Section 3620.1, such as trucks, buses, station wagons, and small equipment, will be authorized as the needs of the operating agency justify. Such vehicles will be equipped as required at the time of purchase. No modifications will be made to any vehicle without approval of Office of Fleet Administration, Department of General Services.

### **SAFETY STANDARDS FOR ALL STATE VEHICLES**

**3622**

(Renumbered from 4106 5/72)

The safety standards appearing in the following subsection are to be included in the specifications for all applicable State-owned vehicles.

## **SAM – PURCHASES (Cont.)**

### **BACK-UP ALARMS**

**3622.2**

(Revised 6/80)

Back-up alarms are required for every truck that has a body capacity of 2–1/2 cubic yards or more that is used to haul dirt, rock, concrete, or any construction material. The standard alarm to be used is a mechanical or approved electronic alarm that automatically emits a warning sound when the vehicle is moving in a reverse direction. Alarms used shall be listed as acceptable by the Department of Industrial Relations.

Such back-up alarms are recommended for use on other vehicles at installations where pedestrians are or may be exposed to the hazard of backing vehicles.

### **TRAILER HITCHES AND COUPLINGS**

**3622.3**

(Revised 1/88)

All trailer hitches and couplings that are installed on towing vehicles and trailers shall comply with Society of Automotive Engineering (SAE) Specification J 684f. Standard hitches will be Class 2, 3, or Class 4. The following rules also apply:

- Minimum equipment for vehicles used to tow trailers with a Gross Trailer Weight (GTW) up to 3,500 lbs. shall be an SAE Class 2 hitch (2" ball on a 1" shank).
- Minimum equipment for vehicles used to tow trailers with a GTW 3,500 lbs. to 5,000 lbs. shall be an SAE Class 3 hitch (2" ball on a 1" shank).
- Minimum equipment for vehicles used to tow trailers with a GTW over 5,000 lbs. shall be either (a) a SAE Class 4 hitch (2–5/16" ball on a 1–1/4" shank), or (b) a pintle and eye hook type hitch provided and attached in accordance with SAE J 847 standards.
- All hitches shall be frame attached (no bumper hitches permitted). "Barden" or similar type bumpers shall be attached to the frame and installed or be attached to and/or reinforced to constitute a suitable Class 3 hitch.
- All installations shall be in compliance with the specifications and recommendations of the Society of Automotive Engineers, the manufacturer of the towing vehicle and the manufacturer of the towed vehicle.

## **SAM – PURCHASES (Cont.)**

### **TRAILER WIRING CONNECTIONS**

**3622.4**

(Renumbered from 4106.3 5/72)

Trailer lights and connections shall be in accordance with Society of Automotive Engineering (SAE) Specification J 560 A. Connecting cable and conductors shall meet the standard of SAE J 559.

### **STANDARD EQUIPMENT**

**3624**

(Revised 9/91)

The typical vehicle is equipped with automatic transmission. The following items of equipment, optional or standard for the model under contract, are provided:

- Installed safety seat belts and shoulder harness
- Directional signal with emergency flasher, and backup lights
- Rearview mirrors, inside and remote left-hand outside, right-hand manual
- Electric intermittent windshield wipers and manual windshield washer
- Manually controlled air conditioner, factory installed
- Tinted glass all around
- Fresh air heater and defroster, with multi-speed control
- Rear window defroster
- Oil filter, air cleaner, and high temperature thermostat
- Required emission control device(s)
- Dual padded sun visors, padded dash, and front seat padded with foam
- Glove compartment with lock
- Coat hook on each side of rear compartment
- Floor covering in front, rear, and luggage compartments
- Arm rests on left and right sides
- Cigarette lighter, ash receivers in front and rear compartments
- Power steering
- Tilt steering wheel
- Power brakes, disc front
- Cruise control
- Manufacturer's standard radio with push button tuning and antenna
- Radial tires
- Maintenance free batteries
- Coolant recovery system
- Inside hood release

## **SAM – PURCHASES (Cont.)**

### **AUTOMOTIVE EQUIPMENT, SPARE PARTS AND REPLACEMENT ITEMS 3626** (Revised 12/06)

Whenever feasible, agencies should avoid maintaining a stock of repair parts, tires, tubes, batteries, and spark plugs. These items and other common automotive supplies should generally be obtained at the time of need from the State garages in Fresno, Los Angeles, Oakland, Sacramento, San Diego, or from contract vendors. Tires and batteries are available at San Bernardino State Garage (pool office). Stocking of parts by agencies may result in increased costs due to the parts becoming obsolete, being of the wrong size or design, loss, or having unnecessary surplus supplies accumulate in agency stockrooms.

### **ANTIFREEZE 3626.1** (Revised 12/06)

All agencies will make the necessary arrangements early in the Fall to protect State equipment which will be operated in freezing weather. Antifreeze may be purchased from the State garages in Fresno, Los Angeles, Oakland, and Sacramento, where it will be installed for a fee. This is billed to the agency by the garage. State departments with automotive fleets may purchase and install supplies of antifreeze in assigned vehicles. The purchases may be made either through the Office of Procurement or via a department's delegated purchase authority. In an emergency, officers and employees may purchase antifreeze for their vehicles. See SAM Section 3629.

### **AUTOMOBILE BATTERIES 3626.2** (Revised 12/06)

Automobile batteries are to be secured through the State contract or, in an emergency, may be secured by a credit card purchase. See SAM Section 3629. Officers and employees who purchase batteries other than as authorized will be required to personally pay the difference between the State contract price and the price billed to the State by the vendor from whom the battery was obtained. No trade-in allowance is made for batteries.

Where feasible, agencies should accumulate junk batteries and sell them to recognized junk dealers by the bid process. Agencies with offices in the vicinity of Fresno, Los Angeles, Oakland, and Sacramento, may turn old batteries in at State garages for sale by the Department of General Services.

## **SAM – PURCHASES (Cont.)**

### **OIL FILTER ELEMENTS**

**3626.3**

(Revised 12/06)

Oil filter elements (not the complete filter) may be purchased on the credit card of the contracting company; however, when convenient, the State garages in Fresno, Los Angeles, Oakland, and Sacramento should be called upon for this service.

State agencies are encouraged to use re-refined oil when replacing the oil for vehicle maintenance.

### **SPARK PLUGS**

**3626.6**

(Renumbered from 3623 5/72)

Spark plugs will be ordered by model number if known, or the make, year, and model number of the equipment requiring the spark plugs. Emergency purchases of complete sets will be authorized only if request for payment is on an automotive repair shop (not a service station) invoice for engine repair or tune-up. Emergency replacement of single spark plugs is authorized and may be charged on a credit card.

## **SAM – PURCHASES (Cont.)**

### **TIRES AND TUBES**

**3626.7**

(Revised 12/06)

A new tube should be installed in a new tire only when the condition of the old tube is such that it is no longer usable. If the old tube is blown out, has been patched a number of times, has grown in size (a good indication of this is chafing where the tube meets the rim), or has some other fault, it should not be used in a new tire. No trade-in allowance is made for old tires. In an emergency, tires or tubes may be purchased on a credit card providing SAM Section 3629 is followed.

Where feasible, agencies should accumulate old tires and tubes and sell them to recognized junk dealers by the bid process. Agencies with offices in the vicinity of Sacramento and Los Angeles may turn old tires or tubes in at state garages for sale by the Department of General Services.

Purchase of any special noncontract tires and tubes (such as puncture-proof tubes) must be approved by the Office of Fleet Administration, Department of General Services, and will be requested on regular purchase estimates. Bias-ply belted tires, nylon or polyglass are recommended as replacement except when replacing radial tires. Radial tires should be replaced with comparable grade radial tires. White sidewall tires may be accepted on the State Tire Contract in the event black wall tires are not available from the contractor. However, any white wall tires furnished must be mounted with the white wall turned in so it is not visible. White wall tires may be installed on vehicles with undercover plates.

Vehicles delivered with white sidewall tires by the vendor should not have the tires changed. When radial tires must be replaced and the worn tires being replaced were mounted with white walls outside, they may be replaced with white walls mounted outside provided there is no added cost to the State.

## SAM – PURCHASES (Cont.)

### **DIESEL, BIODIESEL, AND RENEWABLE HYDROCARBON DIESEL BULK FUEL PURCHASES** (New 10/2015)

3627

State agencies shall follow the diesel, biodiesel, and renewable hydrocarbon diesel (renewable diesel) bulk fuel purchasing requirements listed below.

#### General Purchasing Requirements

When making bulk fuel purchases to supply state vehicles and/or other mobile equipment which utilize conventional diesel fuel, state agencies shall purchase contracted renewable diesel fuel in lieu of contracted conventional diesel and both B5 and B20 biodiesel fuel blends (biodiesel). Definitions for diesel, biodiesel, and renewable diesel fuel can be found in the California Code of Regulations [§95481](#). Additional information pertaining to Department of General Services' (DGS) statewide contracts for bulk diesel, biodiesel, and renewable diesel can be found at:

<http://www.documents.dgs.ca.gov/pd/contracts/ContractIndexListing.pdf>

#### Exemptions to Renewable Diesel Purchasing Requirements

Agencies may purchase bulk diesel or biodiesel fuel, in lieu of renewable diesel fuel, if any of the following exemption criteria is met:

- a. Bulk renewable diesel fuel is not available, in the quantities needed, from that region's contracted renewable diesel fuel provider.
- b. The cost to purchase contracted bulk renewable diesel fuel would exceed the cost to purchase the same quantity of contracted bulk conventional diesel fuel by 20%.
- c. The operational viability of diesel powered vehicles and equipment would be compromised through the use of renewable diesel fuels. Original Equipment Manufacturer (OEM) refusal to honor a vehicle engine warranty through an agency's use of renewable diesel may be considered an operational viability issue.
- d. In emergency response situations, the delivery time of bulk renewable diesel fuel would exceed the delivery time of conventional diesel fuel.

Agencies that utilize one or more of these exemptions are encouraged to use biodiesel, in lieu of conventional diesel fuel, whenever possible.

(Continued)

## SAM – PURCHASES (Cont.)

(Continued)

### **DIESEL, BIODIESEL, AND RENEWABLE HYDROCARBON DIESEL 3627 (Cont.1)** **BULK FUEL PURCHASES** (New 10/2015)

#### Reporting of Renewable Diesel Utilization Exemption

As part of an agency's annual fuel reporting requirements, each agency that invokes one or more of the renewable diesel utilization exemptions, shall complete the *Renewable Diesel Utilization Exemptions Form* and submit the completed form quarterly to DGS' Office of Fleet and Asset Management (OFAM). The *Renewable Diesel Utilization Exemptions* form can be located at: <http://www.dgs.ca.gov/ofam/Forms.aspx>. The department will be required to include the following information (as applicable) on the Form:

- 1) Information demonstrating an agency's decision to purchase bulk diesel or biodiesel, in lieu of renewable diesel, due to product availability, or timeliness of delivery in emergency situations.
- 2) Information and supporting documentation demonstrating an agency's decision to purchase bulk diesel or biodiesel, in lieu of renewable diesel, due to the price of renewable diesel exceeding the contract purchase price of bulk diesel or biodiesel by 20% or greater. Documentation must include the cost of renewable diesel from that region's contracted renewable diesel fuel provider, and the cost of bulk diesel or biodiesel (whichever is purchased) for the same quantity.
- 3) Information and supporting documentation demonstrating an agency's decision to purchase bulk diesel or biodiesel, in lieu of renewable diesel, due to operational viability. Documentation must include a list of vehicles by equipment number that the agency has exempted due to operational viability.

## SAM – PURCHASES (Cont.)

### EMERGENCY PURCHASE OF AUTOMOTIVE EQUIPMENT

3629

(Revised 12/06)

It is permissible to charge against credit cards items which are needed for real emergencies, such as damaged individual spark plugs (not sets), automatic transmission oil, light bulbs, fan belts, windshield wiper blades, cable for battery terminals, gasoline tank caps, tire or tube valve core, etc.

Purchases of antifreeze may be made on credit cards only in an emergency when the vehicle has lost its coolant due to a water hose or pump failure or is subjected to unseasonable freezing temperatures. This provision does not relieve agency officials of the responsibility for anticipating antifreeze requirements and ordering sufficient supplies in accordance with SAM Section 3626.1.

Purchase of tires, tubes or batteries may be made on credit cards under the following conditions:

1. Locations where the State's regular contractors have no outlets or stock or where the distance is too great to purchase from contractors' regular stock locations because of the time or expense involved; or
2. Special situations in an emergency where travel is required and purchase is necessary during hours when the regular contractor is closed (between 6 p.m. and 8 a.m. or on Sundays and holidays).

When a bona fide emergency requires the user of a General Services pool car to pay cash for repairs or for items included in the pool car rental charges, he/she may be reimbursed. See SAM Section [0758](#).

The usual product guarantees apply to these items. Trade-in allowance is applicable under certain conditions; if service station allows credit for old battery or tire, apply it toward purchase of new battery or tire.

It is the responsibility of the employee to justify the appropriateness of all emergency purchases as soon as possible. The Department of General Services will review the purchases when billed, and those not justified will be sent to the employee's agency for remittance from the employee. See SAM Section [4109](#) for auditing of charges.

## **SAM – PURCHASES (Cont.)**

### **TAX-FREE ALCOHOL** (Revised 10/2014)

**3661.3**

State agencies may purchase tax-free alcohol under their delegated purchasing authority. Agencies responsible for the purchase and administration of alcohol must apply for a permit from the Alcohol and Tobacco Tax and Trade Bureau, Department of the Treasury, Internal Revenue Service. Use this [link](#) to obtain information regarding obtaining a [permit](#). Further guidance can be found in Tax free alcohol information at this link: [http://www.ttb.gov/tax\\_audit/p51504.pdf](http://www.ttb.gov/tax_audit/p51504.pdf)

### **OFFICE EQUIPMENT**

#### **UTILIZATION OF SURPLUS PROPERTY** (Revised 3/89)

**3671**

A review procedure will be established within each agency or institution to determine that the expenditure is necessary and that all possible sources of surplus office equipment, including the Office of Procurement, Surplus Property Section, Department of General Services, have been considered. See SAM Section [3520, 3521.1](#).

The Office of Procurement will not process any purchase estimate for office equipment which does not include signed statements by the officer responsible for equipment requests that: (a) the expenditure is necessary, and (b) there is no current surplus property available to meet the agency or institution's need.

#### **DESKS AND RELATED ITEMS OF WOOD FURNITURE** (Revised 10/2014)

**3672**

Refer to the State Contracting Manual ([SCM](#)) Volume 2, Chapter 2, Section C, and Topic 3 for more information on purchasing furniture.

## SAM – PURCHASES (Cont.)

### PAPER STOCK CHECKS

#### ORDERING PROCEDURES

(Revised 3/96)

3696.1

Paper stock checks will be used for all accounts maintained in the centralized State Treasury System. Bank transit routing symbols, account identification and check serial numbers will be printed in magnetic ink. A standard design and color for checks and check copies have been established for use by all State agencies. Unless specifically authorized by Department of Finance, Fiscal Systems and Consulting Unit, no State agencies will deviate from these standards:

Checks will be ordered as follows:

1. Contract/Delegation Order, [STD. 65](#), will be used to order checks from the contractor in accordance with the terms, conditions, and ordering dates specified in the annual contract. The minimum number of checks to be ordered will be 1,000 checks. Agencies will maintain sufficient checks on hand to last at least nine months, but not to exceed two years. The only exception allowed is that the minimum order of 1,000 checks may exceed a two-year supply. All orders received by the vendor will be consolidated and filled at one time four times a year. Agencies should allow approximately 120 days for delivery after the consolidation dates mentioned in the contract.
2. If an agency requires checks which are not available through the annual contract, submit a purchase estimate enclosing two voided check samples to the Department of General Services, Office of Procurement. Such checks will have the agency name and account numbers printed on each check. Agencies should allow 120 days for delivery if checks are ordered by estimate.
3. In case of an emergency only, agencies may order checks on Sub-Purchase Order, STD. 40 or [40A](#), from the State Treasurer's Office, P. O. Box 942809, Sacramento, California 94209-0001. The order will be accompanied by a detailed written explanation of the reason for the emergency and the steps being taken to ensure the emergency will not recur. Orders will not be filled without the explanation. The minimum number of checks which can be ordered is 1,000 or a multiple thereof. Orders will be limited to a sufficient volume to cover the agency's needs until its regular checks can be ordered and delivered. Normally, the Treasurer's Office can deliver the emergency checks in seven to ten days after receipt of the order. The checks will be issued in random, consecutively numbered blocks without regard to the check numbers used previously by the ordering agency. The agency account number on which the checks will be written must be indicated on the sub-purchase order so that it can be encoded on the checks.

All agencies should order and keep sufficient supplies of regular checks on hand so that emergency orders will not be necessary. Emergency orders will cost considerably more than regular orders due to storage and extra processing prior to use by the agency.

See SAM Section [8041](#) for check writing procedures.

## **SAM – PURCHASES (Cont.)**

### **ENVELOPES FOR PAPER STOCK CHECKS**

(Revised 6/80)

**3696.2**

Special window-type envelopes to be used for mailing paper stock checks are obtainable from the Department of General Services, Office of Procurement, and Material Services Section. Requisitions will be made on Supply Order, STD. 116.

### **CONSOLIDATION OF AGENCY ORDERS**

(Revised 9/77)

**3696.3**

Contract/Delegation Order, [STD. 65](#), for continuous-form checks must be submitted to the contractor in accordance with the schedule noted on the contract.