

Office Equipment Acquisition Checklist

Office equipment such as multi-function copiers (“MFCs”) and phone systems can range from the very simple to the very complex. In most cases, you can compare the purchase of an MFC to that of an automobile. They have comparable costs, wide ranges of options available, and may have a financing component to them...a lease. This Checklist should help you understand the process of acquiring large office equipment. The C3 Resource Specialists are always a phone call or email away (213-637-7699 or c3specialist@la-archdiocese.org) if you need help with the process.

Assess Your Needs

- Determine what you need before talking to any vendors. What problems are you trying to solve? What services will this equipment provide?
- For larger needs (like multiple copiers, phone systems, etc.) you should create a Requirements Document that outlines what you are trying to do and what you expect the vendor to provide. It does not need to be overly detailed, but it should document all the important specifications and features that you think would be useful.
- Research different equipment on the Internet. All major vendors publish informational guides, user manuals, and possibly pricing information. Doing a little “homework” can help you refine your requirements and result in a better purchase for your location.
- Your research should provide you with some estimates of costs. Before you go any further, make sure you have budget available for the expected term of use of what you want to purchase or lease. Remember that you need to account for the purchase (or lease) and the additional operating/maintenance costs over the expect term.
- If you have an existing lease, make sure there is no more than six months left to go on that lease before you upgrade to a new MFC.

Select Your Vendor and Equipment

- Solicit quotes from more than one vendor. For larger purchases or leases from a vendor that you do not know obtain and check references. If you are not familiar with any vendors or have questions about a vendor contact the C3 Resource Specialists for help.
- Provide as much detail about your requirements to your vendors so they can build quotes that satisfy your needs. If you wrote a Requirements Document, you can provide that to the vendors for reference. Do not reveal your budget to any vendor. Let them provide “organic” quotes.
- Be sure to provide a copy of the Archdiocesan “Exhibit A: Addendum to Photocopier Agreements” to every vendor. This addendum must be incorporated into any service contract that any vendor would provide to your location.
- When reviewing quotes, look at more than just the costs. Does the quote satisfy your requirements? Are there any “upsells” or other unneeded extras? If you are leasing, are the terms acceptable? Depending on your budget requirements, you may need to have a vendor “refine” a quote to better meet your budget.



- Contracts for maintenance, service and consumables (i.e. printer toner or ink) should NOT be incorporated into the purchase cost. They should be quoted as a separate contract, usually with an annual renewable term.
- If you are having a vendor perform a “buy out” of an existing lease you CANNOT have the vendor deliver a check to you for the old lease “buy out”. The vendor must either send a check directly to the lessor or to the Financial Services Department at the ACC. In the past, some locations have gotten themselves into trouble by taking the “buy out” money and spending it inappropriately. They are then stuck with two lease payments. The Financial Services department will take the “buy out” payment and pay the old lessor directly on behalf of the location.

Complete Your Paperwork, Lease and Maintenance Contracts

- When you decided on an acceptable quote, have the vendor provide you with all documentation needed to order, finance (if you are financing) and provide any additional services. The equipment order and service contracts must be in the name of the location and the location’s tax ID number must be used.
- If the TOTAL VALUE OF THE PURCHASE OR LEASE (that is, the sum of all payments) is:
 - less than \$20,000 then the parish Pastor (for parish offices and elementary schools) or the High School Principal can be signatory for all documents.
 - \$20,000 or more Then the Vicar General must sign the order and finance contracts.
- Contracts for maintenance and service can be treated as contracts less than \$20,000 in value.
- Complete and sign a “Request for Copier and Other Office Equipment Lease Approval and Signature” form.
- Send all documentation to leasing-help@la-archdiocese.org and the Office of the General Counsel for processing. This documentation should include the Request for Review, the order form, the financing form and contract, any service/maintenance contracts, any lease “buy out” information and a completed “Exhibit A” form.. DO NOT SIGN ANY ORDER FORM, FINANCE FORM or SERVICE CONTRACT.
- If there are any questions or revisions required, you will be contacted. Once all issues have been resolved you will be given a copy of signed documents to pass back to your vendor OR you will be told to sign the final documents if the value is less than \$20,000.
- Be sure to retain a least one copy of all fully signed documents in a place where office staff can retrieve them. At some point in the future, i.e. at the end of the lease, someone at your location will need to be able to read those documents.

Delivery, Set Up and Return of Old Equipment

- If you are returning equipment that is coming off a prior lease, be sure that you have the correct equipment return instructions and that you have the permission of the prior lessor to return the equipment. Most lease contracts prohibit the storage or transport of leased equipment anywhere other than the original installation location without written permission.



- Before allowing the vendor to remove any old equipment, be sure to have that equipment undergo a “security erasure” process to remove any stored images, files and configuration information. This may require a service call to the current equipment vendor and there may be a charge for the service.
- Be sure your vendor coordinates delivery and configuration of any network-connected equipment with your local IT support. Most vendors will provide a configuration worksheet that needs to be completed before the equipment can be installed.

