

The Office of Central Procurement

Procurement Basics

Agenda

- The Office of Central Procurement Overview
- Policy Hierarchy – The authority behind the process
- How Does Procurement Work?
- Types of Bids
- Exempt Purchases
- Best Practices
- Case Study – Application of “real world” examples
- QUIZ
- Handouts / email PDF files
 - PowerPoint, Terms & Conditions, File Naming Format for OK Corral

The Office of Central Procurement Overview

Chief Procurement Officer:

Scott Schlotthauer, C.P.M., CPO

Assistant Director: (Audio Visual, IT, Software, Computers)

Leigh James, C.P.M., CPO

P-card Administrator:

Carla James, CFE

Senior Buyer: (Construction, Facilities, Furniture, Title 61)

Marty Casteel, CPO

Senior Buyer: (Consulting, Lab, Office Supplies, Services, Benefits)

Joe Teel, CPO

Buyer II: (Ag, Hvy Equip, Medical, Vet, OK Corral Admin)

Matt Wessel, CPO

Buyer II: (Athletics, Culinary, Custodial, Fleet, Hotel, Grounds)

Brandon Cook, CPO

P-card Compliance, Accountant II:

Danielle Reuter

Sr. Administrative Support Specialist:

Carey Dale

Purchasing Assistant:

Belinda Rowden

Purchasing Phone: 405.744.5984

Email: purchase@okstate.edu

Procurement Overview

Chief Procurement Officer:

Policy 2.07 - Uniform and Integrated Purchasing and Contracting

Scott Schlotthauer, C.P.M., CPO

- The Chief Procurement Officer (CPO) of Oklahoma State University is designated as the CPO for all entities governed by this Board.
 - OSU - Stillwater, Tulsa, Oklahoma City, & Okmulgee
 - Northeastern Oklahoma A&M College
 - Langston University
 - Connors State College
 - Oklahoma Panhandle State University

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Procurement Overview

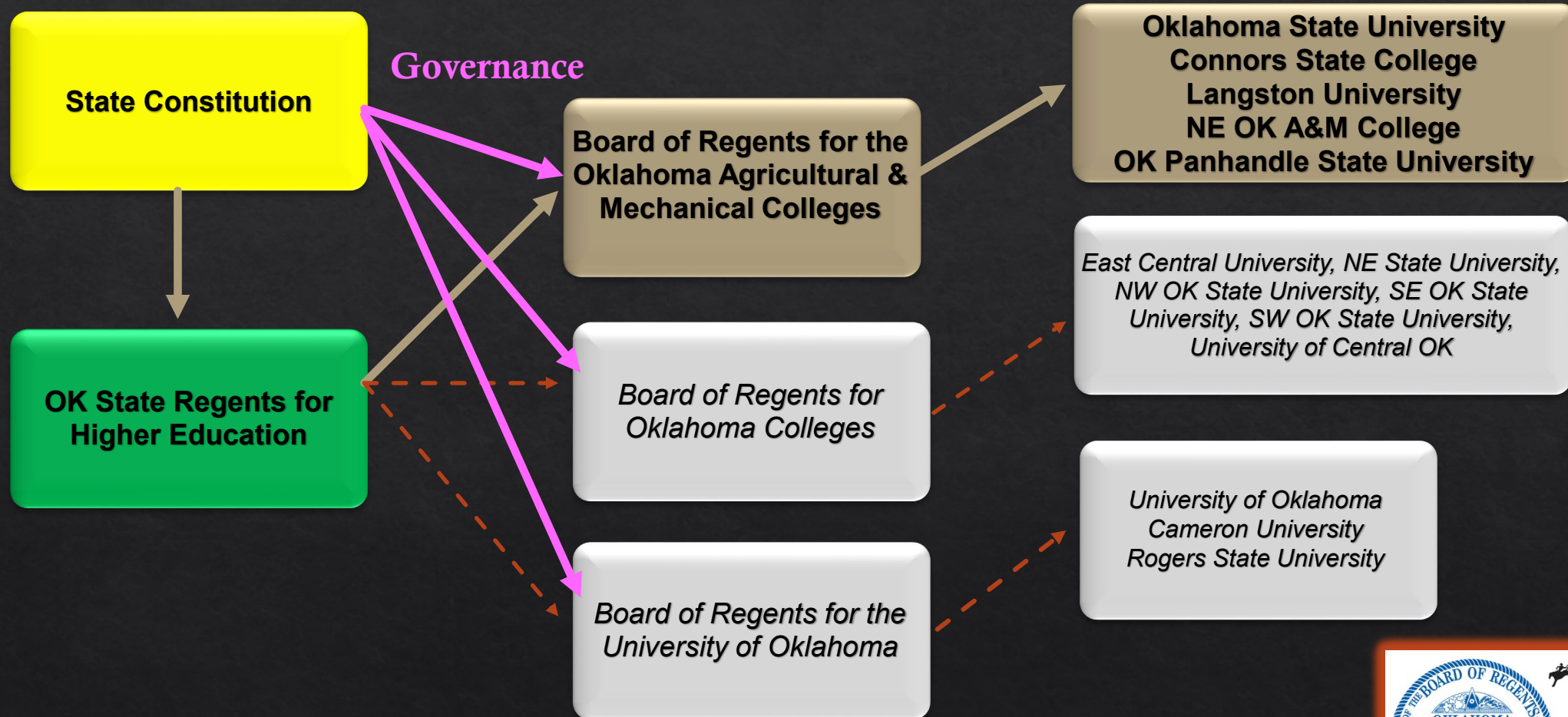
Why is Procurement Important to Me?

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Purchasing Overview

Higher Education Constitutional Procurement Authority



The Office of Central Procurement



Procurement Overview

Policy Guidance Hierarchy

- State Constitution – Board has the authority of governance for all institutions
- Board of Regents for the Oklahoma A&M System – Policies Set Forth – **Policy 2.07**
 - All campuses and schools are regulated by policy
 - Ability to make exceptions by Board policy
 - Link to BOR Policy: <http://regents.okstate.edu/node/102>
- State Statutes – Oklahoma Law
 - Title 74, the Oklahoma Central Purchasing Act (All Agencies - Competitive Bid)
 - Title 62, Oklahoma Public Finance
 - Oklahoma Title 61 Construction (not covered in this training)
- Federal Regulations
 - CFR rules – when federal funds are being utilized



Procurement Overview

Policy Guidance Hierarchy, con't.

- University Policy & Guidelines – Policies Set Forth by each University or Campus
 - Policies to further enhance or define Board policy – implementation
- Campus, College, Division, or Departmental Policies as Applicable



Procurement Overview

The Office of Central Procurement Guidelines – OK Corral

<http://airs.okstate.edu/okcorral/guidelines.html>

Word document will open
Top menu – Select VIEW
Check box - Navigation Pane
Document is searchable



Procurement Overview

The Office of Central Procurement Responsibilities

- Facilitate contracting and review with Board legal counsel
 - Advise departments and units on Board policy, procedures, state statutes, and university policies
 - Maintain compliance
- Obtain bids and quotes as needed
- Review and process requisitions
- Issue purchase orders
- Review and sign all expenditure contracts and agreements for the OSU system
- P-card administration and oversight
- Supplier contract and price negotiation
- Liaison with all suppliers



Procurement Overview

The Office of Central Procurement Responsibilities, continued

- Keep OSU and the A&M System in compliance with all laws and policies
 - Serious consequences if guidance is ignored
- Purchasing priority hierarchy
 1. Compliance
 2. Add value
- NOT here to slow down the process
- NOT here to make things more difficult
- NOT here to cause more work for you
- Purchasing Departments exist for your PROTECTION



Procurement Overview

How does Procurement Work?

The Office of Central Procurement



How Does Procurement Work?

The Office of Central Procurement Philosophy

PARTNER with all units, departments, colleges, divisions, and campuses to assist, guide, and direct the procurement process of OSU and the A&M System through open communication, cooperation, and working to establish two-way dialogue early in the procurement process.

- Ways to build a PARTNERSHIP
 - Get to know a Buyer in Procurement that works with your commodities
 - If not sure, ask questions before starting a requisition or bid request.
 - Seek out advise on best plan for the project or purchase
 - Partner with a Buyer in Procurement to develop and complete all needed requirements or specifications PRIOR to submitting a requisition.



How Does Procurement Work?

The Office of Central Procurement Mission:

- To facilitate the procurement of goods and services for the OSU System and the A&M Colleges on a timely and “**best value**” basis or “**lowest and best**” basis; and provides administrative direction within established standards.
 - **Best Value** - means tradeoff price between price and performance that provides the greatest overall value benefit under the specified selection criteria. (Lowest price doesn't mean it is the best value).
 - **Lowest and Best** - means an acquisition based on criteria which include, but not limited to the following: The lowest total purchase price, the quality and reliability of the product, and the consistency of the proposed acquisition with the OSU/A&M Board of Regents planning documents and announced strategic program direction.



How Does Procurement Work?

Definitions and Terms

- **Acquisition** - Items, products, materials, supplies, services, and equipment a state agency acquires by purchase, lease purchase, lease with option to purchase, or rental pursuant to the Oklahoma Central Purchasing Act
- **Bid** - An offer in the form of a bid, proposal, or quote a bidder submits in response to a solicitation
- **Bidder** - An individual or business entity that submits a bid in response to a solicitation
- **Solicitation** - A request or invitation by the Chief Procurement Officer of a state agency for a supplier to submit a priced offer to sell acquisitions. A solicitation may be an invitation to bid, request for proposal, or a request for quotation
- **Supplier or Vendor** - An individual or business entity that sells or desires to sell acquisitions to the System



How Does Procurement Work?

Definitions and Terms, continued

- **FOB DESTINATION** – (Free On Board) The company shipping the freight is responsible for and is considered the owner of the freight until it is delivered to the destination and signed for by the purchaser or agent (Department, Unit, or Central Receiving). **FOB Shipping Point is not allowed** (*places the University at risk*)
- **Split Purchase** – The intentional breaking down of a known requirement to stay within the purchase limit to avoid sending the acquisition through the appropriate approval process or workflow (i.e. \$5,000 / \$25,000). Misdemeanor in the state of OK.
- **Net 30-Days** – OSU/A&M payment terms are Net 30 after receipt of goods or services and invoice. (74 O.S. §85.44(B)).
 - **NO PRE-PAYMENTS** – cannot pay for goods or services in advance
 - Payment can only be made after receipt of goods/services



How Does Procurement Work?

Related Policy

- PO required before work begins
 - As it pertains to the A&M system, the purchase order is the official notice for the supplier to proceed.
 - The PO is evidence that the proper approval process has occurred and that funding is in place to pay for the goods or services.
 - Any invoice or claim dated prior to the PO date is a violation of encumbrance law and will require approval by the Chief Administrative Officer (CAO) for the institution to pay any invoices.
 - Reference: 62 O.S. §34.62, Encumbrance requirements for payment of state funds.
 - As stated in 74 O.S. § 85.44B, payment for goods or services pursuant to contract shall be made only after products have been provided or services rendered.
 - OSU Policy 3-0145-4.03 – “A requisition must be issued in advance for any anticipated purchase”.



How Does Procurement Work?

Definitions and Terms, continued

- **Workflow** – The approval process for a requisition or acquisition
- **Terms and Conditions (T&C's)** – The Terms of an Agreement or Contract are the conditions under which the agreement or contract is executed.
 - OSU and the A&M System has a standard set of Terms and Conditions to which Suppliers must Agree.
 - Sets the applicable state law, liability, and all contract Issues that may arise
 - Only the CPO of the System can approve additional T&C's for OSU
- **OK Corral** – Is a Comprehensive e-Procurement System Used by the Entire A&M System. It is the system for creating purchase orders, submitting bids, and managing contracts



How Does Procurement Work?

Procurement – Best Practices – Acquisitions / Requisitions

- Purchase Amount: \$0.00 - \$5,000
 - Conducted by the Department or Unit
 - Check to see if the item is available by contract in OK Corral (punch-out)
 - \$0.00 - \$5,000 may be placed on a P-Card (FY aggregate / monthly) or requisition
 - Contact Carla James for P-Card guidelines and training
- Purchase Amount: \$5,000 - \$25,000
 - All items from \$5,000 to \$25,000 must be bid by the Department
 - Identify suppliers and obtain 3 quotes
 - Quotes: Formal Written, Telephone, Email, Website Pricing, Other
 - Document, Document, Document
 - All quotes must be uploaded to the OK Corral requisition



How Does Procurement Work?

Procurement – Best Practices - Acquisitions / Requisitions

- Formal Quotes (\$5,000-\$25,000)
 - Provide the Supplier with all the details needed to obtain a quote
 - Item description, quantity, etc.
 - Attach detailed specifications
 - ✓ FILE NAME FORMAT: SPECS.DESCRPTION.DATE
 - ✓ SPECS.NMR600MHZ-JONES.2016.03.20
 - Establish desired delivery / install dates
 - Quote due date and time



How Does Procurement Work?

Procurement – Best Practices - Acquisitions / Requisitions

- Formal Quotes (\$5,000-\$25,000)
 - Obtain Quotes from the Supplier (min of 3)
 - Quotes are returned by suppliers
 - Award to the LOWEST bidder that meets specifications
 - ✓ Document if not the lowest – NOT meeting specs
 - Start a requisition in OK Corral using the awarded supplier
 - Attach all 3 Quotes and Documentation to OK Corral
 - ✓ FILE FORMAT: QT NUMBER.SUPPLIER.DATE
 - ✓ QT1.FISHER.2016.03.20
 - ✓ QT2.BIORAD.2016.03.20
 - ✓ QT3. AGILENT.2016.03.02



How Does Procurement Work?

Procurement – Best Practices - Acquisitions / Requisitions

- Quotes – Policy 2.07.(13)

Whenever departments obtain quotations, copies of all quotations, or a tabulation showing itemized amounts for all quotations received and naming all firms contacted for quotations, shall be attached to the requisition form submitted to the CPO

- **All quotes must be attached for all requisitions – \$0 & higher**
 - \$0 – \$5000 (1) quote
 - Above \$5,000 three (3) quotes or more
- Punch-outs are exempt - quotes are not obtained – established contracts



How Does Procurement Work?

Procurement – Best Practices - Acquisitions / Requisitions

- **Purchases Amount: (above \$25,000)**
 - Must be submitted as a competitive bid by Purchasing
 - Prepare requisition for estimated dollar amount – with all attachments
 - Specs, Vendor List with email and contact info (min 3), Grant documents, etc.
 - Use Supplier – “Subject to Bid” – Submitted as a competitive bid by Purchasing
 - Department will review bids, complete evaluation, make recommendation for award selection (via OK Corral)
 - Purchasing will make award and generate the Purchase Order
- **Purchase Amount: (above \$50,000) – Sealed Bid**
- **Purchase Amount: (\$75,000 & above) – Prior Board Approval for all A&M Colleges**



How Does Procurement Work?

Review #1 – with partner

- Asked to make a purchase for an item not under contract.
- Budget is \$23,200.00
- Discuss how do you proceed – what are your steps (1, 2, 3, 4, 5, etc.)?
 - Create specifications (details)
 - Establish quote due date / install date
 - Request multiple quotes while providing specifications
 - Review quotes and select the lowest meeting specifications
 - Prepare requisition – attach all quotes
- What if lowest quote comes back with payment terms of Net 15 Days?
- What if lowest quote comes back with 40% down, 60% due at delivery?



Types of Bids

Best Value -vs- Lowest and Best

Board Policy 2.07.(8).C.ii

“Acquisitions or contracts shall be awarded to either the lowest and best or best value bid in the absolute discretion of the CPO”



Types of Bids

Best Value - means tradeoff price between price and performance that provides the greatest overall value benefit under the specified selection criteria

Selection Criteria includes not limited to:

- Operational cost
- Quality
- Technical competency
- Reliability
- Facilitation of data transfer and systems integration
- Warranties and guarantees
- Return policy
- Bidder's financial stability
- Adherence to planning documents and announced strategic program direction
- Experience and record of successful past performance with acquisitions of similar scope and complexity
- Anticipated acceptance by user groups
- Proven development methodology, and innovative use of current technologies that lead to quality results



Types of Bids

Bid Specifications – Best Value, con't.

- Evaluation Criteria – example of weighted matrix:
- Price, References, Overall responsiveness to proposal, and Other (4 areas)
 - Price will be - 20 points
 - References - 25 points
 - Overall responsiveness to proposal - 25 points
 - Other (items from independent investigation as necessary) – 30 points
- The Department / Unit will establish an evaluation committee to score the “Quality” portion of the bid responses.
- Committee can be any size.



Exempt Purchases FLOWCHART

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Exempt from Competitive Bid

- **Sole Source / Sole Brand** – (OK Corral form is available) can be defined as any contract entered into without a competitive process, based on a justification that (a) only one known source exists or (b) that only one single supplier can fulfill the requirements. Although Oklahoma does not permit non-competitive procurements by statute, exceptions are allowed where competition is not feasible.
 - Allowed by Board policy
 - **Sole Source** – Only place to obtain
 - Manufacturer direct without distributors
 - Replacement parts only from manufacturer
 - **Sole Brand** – Buy several places, but specific configuration
 - Bid would be conducted as – NO SUBSTITUTIONS
- OK Corral Form – (Sole Source / Sole Brand Justification Form)



Exempt from Competitive Bid

Sole Source / Sole Brand – 6 Types (codes)

1. Only a specified make, model, or brand will meet departmental needs, even though other makes, models, or brands are available from multiple suppliers. A brand name description or other purchase description to specify a particular brand name, product, or feature of a product, peculiar to one manufacturer does not provide for full and open competition regardless of the number of suppliers solicited. This restricts competition in that only vendors able to supply a specified make, model, or brand are permitted to compete.
2. Market research clearly shows that there is only one responsible supplier and it can be demonstrated that no other supplies or services will satisfy departmental requirements
3. Requirement is for additional units or replacement parts of specified makes and models of technical equipment and only one vendor is available.



Exempt from Competitive Bid

Sole Source / Sole Brand – 6 Types, continued

4. Department needs to purchase supplies or services from the original supplier in the case of a follow-on contract and award to any other supplier would result in substantial duplication of costs that would not be recovered through competition, or in unacceptable delays in fulfilling departmental requirements.
5. Purchase of a brand name commercial item that will be used for **authorized resale**
6. Agency has an **unusual and compelling urgency for supplies or services** and the department would be seriously injured unless the agency is permitted to limit the number of vendors from which it solicits bid/proposals (i.e. - existing software).



Exempt from Competitive Bid

Sole Source / Sole Brand – Penalty Under the Law

Oklahoma Statutes 74 O.S. § 85.45j. Sole Source or Sole Brand Acquisition

(A) 4. Any chief administrative officer of a state agency affirming the certification required by this subsection who knows the information to be false shall be deemed guilty of perjury and upon conviction shall be punished by fine or by imprisonment or both fine and imprisonment pursuant to law.

Upon conviction or upon entering a plea of nolo contendere pursuant to this paragraph, the chief administrative officer shall immediately forfeit his or her position and shall be ineligible for appointment to or employment in the state service for a period of five (5) years after entering a plea of nolo contendere or being convicted.



Exempt from Competitive Bid

Sole Source / Sole Brand – Certifications (2)

(Board of Regents for OSU and the A&M Systems policy 30:10-01-02, section 7)

I, the above named purchaser or end user of the products herein described, affirm we will not accept nor pay for any items not included and described in this requisition and certificate. I understand that the authorization of this certification, knowing such information to be false, may subject me to punishment for perjury.

I, the above named purchaser or end user, hereby affirm that the services or products to be purchased pursuant to this request adhere to the Sole Source type selected above to the best of my knowledge:

Is the only person or business entity which is singularly or peculiarly qualified to provide such services or products, and if a product is the only brand name which is singularly or peculiarly unique, for the following reason(s):





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Exempt from Competitive Bid

Sole Source / Sole Brand – Penalty Under the Law

Examples of a Sole Source

- Code 2 – One supplier – Job Postings in Tulsa World
- Code 3 – Replacement Parts
- Code 4 – Original Supplier (Lab Equipment, consistency of results)



Exempt from Competitive Bid

- **Specialized Lab Equipment** – (OK Corral form is available) Equipment necessary for a unique application, capable of meeting definable and quantifiable parameters within the scope of a project or series of projects, produces necessary and consistent testing/measurement results that cannot be performed or replicated by standard or generically similar equipment, and/or performs tasks more efficiently or cost-effectively than equipment of comparable description.
 - Certificate: *(Board of Regents for OSU and the A&M Systems policy 3:10)*
I, the above named purchaser or end user of the “specialized lab equipment” herein described, affirm that the equipment to be purchased pursuant to this requisition adhere to the definition set forth above. Additionally, I affirm that falsifying the information contained in this document may be seen as a violation of the respected institution’s policies (i.e. OSU policy 3-0720.5.10) and Board Policy 3.10 – Ethics.
 - OK Corral Form – (Specialized Lab Equipment Justification Form)



Exempt from Competitive Bid

2.07 (8) C.ii (a-k)

Exempt from Competitive Bid

- a. Contracts for Architectural, construction management, engineering, legal, and other professional services (Title 18).
- b. Sole Source / Sole Brand,
- c. Special Requests to BOR
- d. Acquisitions related to textbooks, Lab Supplies, Instructional Material, and Specialized Lab Equipment
- e. Grant acquisitions, when specific make/brands and models of items or specific suppliers of services are named in the grant
- f. Contracts/acquisitions with state, city, or government agencies
- g. Acquisitions of livestock, poultry, and crops



Exempt from Competitive Bid

2.07.(8).C.ii(a-k)

Exempt from Competitive Bid

- h. Hotel reservations/activities, transportation, interpreters, group meals, event tickets and the like, directly related and relevant to group student study and travel programs for educational credit
- i. Merchandise and food for resale to the public in department retail outlets, such as restaurants, bookstores, and other support facilities
- j. Utility services regulated by a state or federal regulatory commission or by municipal ordinances or by Indian Tribal Counsel
- k. The CPO reserves the right to competitively bid any acquisition deemed in the best interest of the OSU/A&M System



Exempt from Competitive Bid

Other Policies Providing Exemption from Bid

Exempt from Competitive Bid

- **Policy 2.07.(11)** – (State Contracts) – All entities may use “State Contracts” negotiated by the State Central Purchasing Division in Oklahoma City, whenever entity needs can be served adequately and economically. Requisitions submitted to the CPO shall so indicate if based on a “State Contract” giving the contract number and listing itemized prices as shown on the current contract.

EXEMPT from the bid process.

Requisition is still required & funds must be encumbered prior to commitment for goods and/or services unless placed on P-card (under \$5,000)



Other Exempt Purchases

2.07.(3).A-G

Exempt from Board Approval (A&M's \$75,000 | OSU \$250,000)

- A. Food or items for resale
- B. Bulk gasoline, oil, and fuel
- C. Utilities
- D. Non-construction sponsored agreement contracts and expenditures
- E. Refunds
- F. Feed
- G. Hotel reservations/activities, transportation, interpreters, group meals, event tickets, and the like, directly related to group study and travel programs for educational credit



Procurement Basics

Best Practices

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Procurement Basics

Procurement – Best Practices – Subawards and Grant Purchases

- SUBAWARDS
 - Named in the grant and approved by the funding agency
 - EXEMPT from the bid process
 - Must attach the grant documents – show where it is named in the grant
 - Highlight the section of the attached grant document
 - Add a comment – “See page # XX, highlighted section for named in grant”
 - EXEMPT from prior Board approval
- GRANT PURCHASES
 - EXEMPT from bid when named in the grant, as defined in Board policy
 - Attach all related grant documents
 - Highlight the section of the attached grant document
 - Add a comment – “See page # XX, ...”

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Procurement Basics

Contracts

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Procurement Basics

Procurement – Contracts

- When a contract is in place, it should be used
- Board Policy 2.07 (8) C ii – *“When established Purchasing contracts exist, purchases should be made from such contracts”*
- Contract search feature in OK Corral
 - Types of Contracts
 - Punch-out Contracts
 - General contracts – in OK Corral (non-punch-outs)
 - OSHOP – list of contracts by category



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Procurement Basics

Procurement – Best Practices – Existing Contracts (Punch-out)

Board Policy 2.07 (8) C ii – “When established Purchasing contracts exist, purchases should be made from such contracts”

OK Corral – All suppliers in OK Corral have existing contracts with OSU/A&M

- **Staples** – Office Supplies (Preferred Vendor)
- **Dell** – Computers and Technology (Preferred Vendor)
- **Connection** – Computers, Electronics, etc.
- **CDW-G** – Computer Software, Hardware, Cloud Solutions, etc.
- **Grainger** – (MRO) Maintenance, Repair, Operations – Wide assortment of items
- **Fastenal** – MRO, Welding, Fasteners, Power Tools, & Hardware
- **MSC Industrial Supply** – MRO, Hand Tools, Lighting, Safety, etc.



Procurement Basics

Procurement – Best Practices – Existing Contracts

Board Policy 2.07 (8) C ii – *“When established Purchasing contracts exist, purchases should be made from such contracts”*

- **B&H** – AV, Photography, Video, Surveillance, Projectors, Whiteboards, etc.
- **Henry Schein** – Pharmaceutical and Medical Supplies
- **McKesson** – Pharmaceutical and Medical Supplies
- **Medline** – Veterinarian Supplies
- **HON Furniture** (Fenton Office Furniture) – HON Office Furniture ONLY.
- **Concur Solutions** – Travel Portal, Airfare, Lodging, Rentals, etc.



Procurement Basics

Procurement – Best Practices – Existing Contracts

Board Policy 2.07 (8) C ii – “When established Purchasing contracts exist, purchases should be made from such contracts”

- Fisher Scientific – **PRIME** - Lab Supplies, Lab Equipment and Related Services
- Agilent – Lab Supplies, Lab Equipment and Related Services
- Qiagen – Lab Supplies, Lab Equipment and Related Services
- Bio Rad – Lab Supplies, Lab Equipment and Related Services
- Chemglass – Lab Supplies, Lab Equipment and Related Services
- Airgas Air Liquide – Lab Supplies, Lab Equipment and Related Services
- VWR – Lab Supplies, Lab Equipment and Related Services
- Sigma Aldrich – Chemicals, Consumables, Reagents, Compounds
- Stillwater Steel – Compressed gasses and supplies



Procurement Basics

Review – Best Practices

- Case Study – Group Solutions
 - Develop a step-by-step “Plan of Action” for processing a requisition as requested
 - What steps will you take?
 - What supplier will you use?
 - What authorization is required to process, Dept., Purchasing, or Board?
 - What other information do you need?



Procurement Basics

Case Study #1

Procurement Basics – Case Study #1

You are the “requestor” in OK Corral for your department. You are approached by a member of a research group to submit an order on a grant fund for an instrument. The research group member hands you a quote with the following information:

- Purchase a 400 MHz NMR
- Supplier is Bruker Bio Spin
- Amount is \$265,000.00
- Shipping is FOB Destination
- This is to be custom built to the specifications provided by the research group (quote contains the design specifications)
- Bruker, due to the customization, requires 40% down payment with PO and balance due at delivery.
- Researcher informs you that this purchase is named in the grant and that it is exempt from bid. Provided you with a grant document containing the following statement, *“In year two (2) the grant will purchase a NMR to be used in support of the research”*



Procurement Basics

Quiz Time

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QUIZ

1. How much can you spend without competitive quotes?
 - \$5,000 or Departmental Requirement
2. What is the dollar limit on a sole source contract?
 - Respected Authority (A&M's \$75,000 | OSU- \$250,000) PRIOR Board approval
3. What is required by Board policy if the amount of your purchase will exceed \$25k?
 - Submit to bid – The Office of Central Procurement must bid on your behalf
4. What is the penalty for a falsified sole source contract?
 - Deemed guilty of perjury and loss of job
5. What is the official document giving the supplier “authorization to proceed”?
 - Purchase Order
6. Paying an invoice without a PO in place is a violation of encumbrance law, Procurement Guidelines, and Policy?
 - YES



Procurement Basics

Additional Best Practices

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Procurement Basics

Procurement – Best Practices – OK Corral Attachments

- Attachments can be Added via a Comment / Upload a File
 - List of Vendors: When a acquisition is going out to bid by Purchasing, amount above \$25,000, you will need to provide a list of possible suppliers
 - Supplier Name, Address, FAX, Phone, Email, and Contact Name
 - Minimum of 3 possible suppliers, more is better
 - File Format: VEN.REQUISITION NUMBER.DESCRPTION.DATE
 - Example: VEN.70040187.RESPIRATORS.2016.01.25



Procurement Basics

Procurement – Best Practices – OK Corral Attachments

- Attachments can be Added via a Comment / Upload a File
 - **Quotes:** Attach all (3) required quotes (\$5,000-\$25,000)
 - File Format: QT1.SUPPLIER NAME.DATE
 - Example: QT1.BIORAD.2016.11.12
 - Example: QT2.BIORAD.2016.11.12
 - **Specification:** Attach specifications for requisitions going to bid (above \$25,000)
 - File Format: SPECS.DESRIPTION.DATE
 - Example: SPECS.NMR600MHZ-JONES.2016.11.15
 - **Emails:** Attach any documentation needed to support the purchase
 - File Format: EMAIL1.SUBJECT.DATE
 - Example: EMAIL2.SOLESOURCE-JONES.2016.03.12



Procurement Basics

Procurement – Best Practices – Existing Contracts

Board Policy 2.07 (8) C ii – *“When established Purchasing contracts exist, purchases should be made from such contracts”*

○ Other Areas Covered by Contracts (OSHOP listing in OK Corral)

- Bus Charters
- Fuel
- Furniture
- Moving & Relocation – Faculty & Laboratories
- Disaster Services
- Collection Services
- Copiers / Multifunction Devices
- Document Shredding
- Temporary Employment Services
- Cable Installation and Relocation Services

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Procurement Basics

Procurement – Best Practices – Existing Contracts

Board Policy 2.07 (8) C ii – *“When established Purchasing contracts exist, purchases should be made from such contracts”*

○ Listing of Other Contracts

❖ OK Corral

- Contracts / OSHOP
- State Contracts link
- Texas DIR link
- OK Corral Renewable OSU/A&M Contracts



Procurement Basics

Procurement – Best Practices

- **Alterations, Renovations, And Additions to Facilities (Title 61)**
 - All alterations, renovations, and additions to facilities and grounds should be routed through the OSU Facilities Management or Long Range Facilities Planning (LRFP).
 - Examples: Painting, carpeting, flooring, electrical, HVAC, plumbing, etc.
- **Fraudulent Purchase Orders and Invoices**
 - If a vendor contacts you about a fraudulent purchase order, please contact the purchasing department
 - When you receive an invoice, verify that the items/services were actually ordered and received

