Administrative Professionals Workshop
* DEFINITIONS
* PURCHASE REQUISITION MUST-HAVES
* PITFALLS TO AVOID
* HELPFUL SUGGESTIONS
* QUICK-REFERENCE LISTS
Why? Oh, why?

Why is so much is required to make a simple purchase?

LOUISIANA CONSTITUTION
LOUISIANA PROCUREMENT CODE (RS 39:1551-1755)
LEASE OF UNIVERSITY IMMOVABLE PROPERTY (RS 17:3361)
PUBLIC CONTRACTS (CONSTRUCTION/MAJOR RENOVATION & CAPITAL OUTLAY PROJECTS) RS 38:2211-2296)
FLEET MANAGEMENT (RS 39:360-364)
PROPERTY MANAGEMENT (RS 39:321-332)
EQUIPMENT LEASE-PURCHASE CONTRACTS (RS 39:1761)
LEASE OF UNIVERSITY LAND (RS 41:1201-1291)
CODE OF ETHICS (RS 42:1101-1170)

PUBLIC PRINTING (RS 43:1-34)
STATE ADVERTISEMENTS (RS 43:111-211)
PUBLIC RECORDS LAWS (RS 44:1-41)
ATTORNEY GENERAL’S OPINIONS & LAWS
LOUISIANA ADMINISTRATIVE CODE
EXECUTIVE ORDERS OF THE GOVERNOR
DIVISION OF ADMINISTRATION POLICIES
LACARTE RULES AND REGULATIONS
PPM 49 TRAVEL POLICY
ATTORNEY GENERAL OPINIONS
ETHICS RULINGS
UNIVERSITY BOARD BYLAWS AND POLICIES
UNIVERSITY POLICIES AND PROCEDURES
DELEGATION OF AUTHORITY GRANTED
Why is knowing ‘how to purchase’ important?

UNIVERSITY OF LOUISIANA AT LAFAYETTE

MISSION
The University of Louisiana at Lafayette offers an exceptional education informed by diverse worldviews grounded in tradition, heritage, and culture. We develop leaders and innovators who advance knowledge, cultivate aesthetic sensibility, and improve the human condition.
Definitions
Purchase Requisition – an internal written request to issue an order for the purchase of goods and/or services.

Purchase Order – a legally binding document which serves a promise to pay the seller for goods/services provided.
HOW TO PURCHASE

WHAT

HOW

WHY

WHEN

WHO

WHERE
What to do?

MUST-HAVES FOR A PURCHASE REQUISITION

✓ DETAILED DESCRIPTION FOR EACH ITEM (COLOR, SIZE, TYPE)
✓ QUANTITY
✓ UNIT COST
✓ VENDOR ITEM NUMBERS
✓ SPECIAL INSTRUCTIONS (NEED-BY DATE)
✓ SHIPPING INSTRUCTIONS
✓ SPECIAL DELIVERY INSTRUCTIONS (NEXT DAY AIR)
✓ CONTACT INFORMATION (DEPT and VENDOR)
✓ STATE CONTRACT NUMBER, if applicable
✓ ENTER SEPARATE LINE ITEMS FOR EACH ITEM BEING ORDERED
What not to do

REQUISITION DONT S

1. Do not sign any vendor contract, agreement, or lease. Only the UL-Lafayette President, the VP of Administration & Finance and the Purchasing Department have the authority to obligate the University to a written agreement.

2. It is unlawful to artificially divide a purchase to avoid the procurement/bidding process.

3. A Purchase Order needs to be in place BEFORE work begins.

4. Do not accept gift offers from vendors.

5. Do not use “See attached” when writing a requisition.
**What’s what?**

RULES FOR COMPETITIVE PURCHASES

Can’t use LaCarte? Not Travel? Over $5,000? Construction? Building Repair/Renovations?

<table>
<thead>
<tr>
<th>Transaction Total</th>
<th>University Requirements</th>
</tr>
</thead>
<tbody>
<tr>
<td>$.01 to $5,000*</td>
<td>Requires no competition – requires only one (1) quote</td>
</tr>
<tr>
<td>$5,001 to $20,000</td>
<td>Requires three (3) vendors be afforded the opportunity to quote</td>
</tr>
<tr>
<td>$20,001 to $30,000</td>
<td>Requires five (5) vendors be afforded the opportunity to quote</td>
</tr>
<tr>
<td>Over $30,000</td>
<td>Requires formal advertised sealed bid</td>
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</tbody>
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*Computer hardware >$2500 is considered competitive.*
When is a transaction considered non-competitive?

Non-Competitive Exceptions

Require justification

1. Scientific and Laboratory Research Projects – (lab and scientific supplies and equipment) up to $30,000
2. State Contract Purchases*
3. Public Works/Construction - up to $50,000
4. Software Purchases up to $225,000
5. Professional Services*
6. Sole Source Purchases
7. Emergency Purchases
8. Used Equipment
9. Intergovernmental Purchases
10. Repairs or repair parts by authorized dealers
10. Orders for items on annual POs – already competitively bid
Resources

Purchasing Website Resources

- Purchasing A-Z’s
- Competitive Purchase Exemptions
- State Contracts
- Forms
- Frequently Asked Questions
Allow Time

1. Approved Requisitions (non-competitive) - <1 week from when assigned to buyer
2. Approved Requisitions (Purchasing does RFQ) - approx. 2 weeks
3. Bids - 6-8 weeks
4. Expect longer wait times when:
   - the University is transitioning from one fiscal year to another
   - Purchasing is short staffed
   - Vendor is located out of country
   - Agreements have to be approved by OSP
   - Contracts require signature(s)
   - University observed holidays
   - Weather/emergency related office closures
How to Purchase

IT STARTS WITH YOU

UNIVERSITY OF LOUISIANA AT LAFAYETTE