



IT STARTS WITH  
**YOU**

UNIVERSITY OF LOUISIANA AT LAFAYETTE



UNIVERSITY *of*  
**LOUISIANA**  
L A F A Y E T T E ®

# **Administrative Professionals Workshop**

# Agenda

- \* 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.*



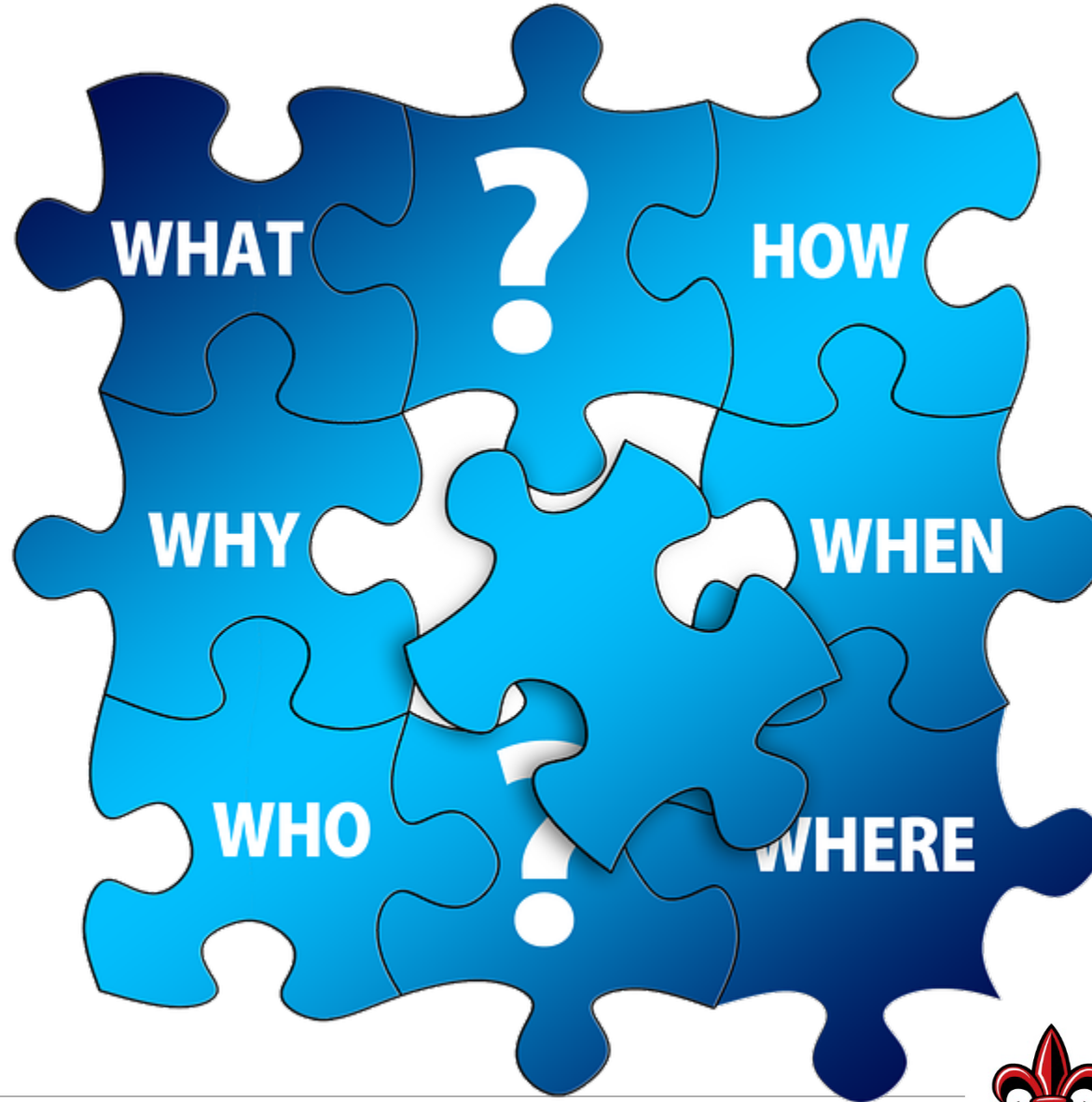
# ***HOW TO PURCHASE***

## **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 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 DONTs**

- 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?**

<b>University of Louisiana at Lafayette Spending Threshold(s) Quick-Reference</b>	
<b>Transaction Total</b>	<b>University Requirements</b>
<b>\$.01 to \$5,000*</b>	Requires no competition – requires only one (1) quote
<b>\$5,001 to \$20,000</b>	Requires three (3) vendors be afforded the opportunity to quote
<b>\$20,001 to \$30,000</b>	Requires five (5) vendors be afforded the opportunity to quote
<b>Over \$30,000</b>	Requires formal advertised sealed bid

*\*Computer hardware >\$2500 is considered competitive.*



# *When?*

## **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
1. State Contract Purchases\*
2. Public Works/Construction - up to \$50,000
3. Software Purchases up to \$225,000
4. Professional Services\*
5. Sole Source Purchases
6. Emergency Purchases
7. Used Equipment
8. Intergovernmental Purchases
9. 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*

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