

**UNIVERSITY OF LOUISIANA AT LAFAYETTE
ADMINISTRATION and FINANCE
PURCHASING DEPARTMENT
Martin Hall, Room 123**

POLICIES AND PROCEDURES

FOR

SUBMITTING REQUISITIONS

FOR

PURCHASING OF GOODS AND SERVICES

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POLICIES AND PROCEDURES

The Purchasing Department operates a centralized resource to ensure that goods and services are procured at the maximum value, in compliance with University and State policies and procedures in accordance with best practices.

In order to carry out its mandate, the University of Louisiana at Lafayette needs to promote economy and efficiency in its operations. The establishment of sound procurement policies and practices, based on the fundamental principle of competition, is an integral part of this process. Open and fair procedures for awarding contracts for goods and services help to create efficient enterprises. They also encourage accountability and the cost effective use of public funds, matters that are of concern to both the University and the State of Louisiana.

RESPONSIBILITY

The Purchasing Department is responsible for obtaining all goods and services from sources *outside* the University for *all departments* of the University in accordance with the Louisiana Procurement Code.

In certain cases this responsibility may be delegated to other appropriate departments.

The responsibility of the Purchasing Department includes the obligation to obtain the maximum benefit for the University for each dollar spent by utilizing the skills of professional purchasing personnel.

The Purchasing Department is vested with the sole authority to order materials and contract for services. The University will assume no obligations except on a duly authorized Purchase Order by the Purchasing Department.

Departments are responsible for obtaining prior approval prior to making a purchase through the submission of a Purchase Requisition.

A "Purchase Requisition" should not be used when requesting payment for services or items already received or for prepayment of books, membership dues, subscriptions to magazines, etc. A "Direct Charge" form should be used for these types of transactions. These are prenumbered forms that can be picked up from the Administration and Finance Secretary.

ANTICIPATION OF NEEDS - TIMING

Except for state contract purchases and LaCarte Procurement Card purchases, Louisiana law requires that competitive bids be obtained for the purchase of all goods and services exceeding \$5000.00. This necessitates time before orders can be issued, therefore, needs should be anticipated well in advance.

Quantities requested should cover, whenever possible, anticipated needs for at least one (1) semester period. This would eliminate many small requisitions (which take as much time to process as large ones). The larger quantities will, in most cases, result in obtaining better prices.

It is a violation of the State of Louisiana law to split or divide the quantities to reduce the cost to circumvent the “Competitive Bid” provision.

WRITTEN SOLICITATIONS

Under normal circumstances, written solicitations from at least three (3) bona fide, prospective bidders are to be obtained for goods and services over \$5000.00 and not exceeding \$15000.00. Institutional policy allows departments, who so choose, to accept the responsibility for soliciting price quotations on behalf of the University, for purchases not to exceed \$15000.00. The quotations must then be attached to a requisition and submitted to the Purchasing Office for evaluation and ordering. The approved form can be found on the Purchasing web site.

Any request for goods and services exceeding \$15000.00 must be processed as written solicitations by the Purchasing office only to at least five (5) bona fide, qualified vendors. This means allowing a period of four to six weeks from the date the approved requisition is received in the Purchasing Department before a Purchase Order can be issued. Departments are advised to carefully evaluate and plan their goods and services requirements to meet this time table.

For small purchases, those under \$5000.00, the department is to submit a Purchase Requisition with a valid vendor quote attached for approval prior to the purchase. Use of the La Carte card is encouraged for vendors who accept the P-Card and if the purchase falls under the cardholders single transaction limit.

For **public works projects**, UL Lafayette has developed procedures to ensure competitive pricing in accordance with LA R.S. 38:2212(A) which allows contract limits below \$150,000 to be bid without advertising using at least three (3) qualified contractors.

LA CARTE PROCUREMENT CARD

The University has entered into an agreement with the State of Louisiana and the Bank of America to participate in a purchasing card program called the ***LaCarte Procurement Card***. This card is a tool used to manage purchasing and accounting by enabling employees to purchase items with the convenience of a credit card while maintaining control over these purchases. The use of this card is limited to low-dollar orders of \$1,000.00 (up to \$5000 if approved) or less.

No competitive bidding is required for purchases made with the LaCarte Procurement Card not exceeding cardholder’s single purchase transaction limit.

LOUISIANA BUDGET CONTROL

The fiscal year for the university is July 1st through June 30th.

EMERGENCY PURCHASES

An “Emergency Purchase” is defined as a purchase made without following normal purchasing procedures in order to obtain goods or services to meet an urgent or unexpected requirement where **health and public safety or the conservation of public resources is at risk.**

Requests for emergency purchases disrupt the regular purchasing operation. However, the Purchasing Department will make every reasonable effort to meet legitimate needs of an emergency nature.

A full explanation of the emergency must be shown on the requisition. As in all cases, the requisition must be submitted, white and yellow copy, to Business Services for approval of funds then submitted to the Purchasing Department for processing.

Some emergency purchases from out-of-town vendors may be handled by the Purchasing Department by telephone or facsimile. Some emergency purchases can be “picked up” from a local vendor. The Purchasing Department can issue a Purchase Order number within a matter of hours.

After goods are “picked up” or after services have been rendered, the invoice is to be attached to the receiving report and then returned to the Purchasing Department for further processing. The receiving report is to be signed by person receiving goods or overseeing services.

CHANGES AND CANCELLATIONS

In the event a Purchase Requisition or a Purchase Order must be changed or cancelled, the department should immediately notify the Purchasing Department. A UL Lafayette reference number (such as the requisition number, the account number, and/or the Purchase Order number) is **extremely important** to all Purchasing personnel. Please have this information available.

All correspondence pertaining to purchases and services, such as adjustments, replacements, return of merchandise, damages, cancellations, tracers, etc., is to be handled by the Purchasing Department.

PRODUCT INFORMATION

The Purchasing Department has information on goods and services on state contract, an extensive vendor list, and various catalogs.

Inquiries from departments regarding available goods and services are invited. The Purchasing staff will assist anyone with all questions regarding requisitions and will determine the best available method to use in acquiring goods and services.

VENDOR VERIFICATION

The Purchasing Department confirms that recipients of awards for goods and services are not debarred or suspended pursuant to Title 40 CFR Part 30.13 (ref Title 2 CFR part 1532). This verification occurs through information obtained from the Excluded Parties List System (EPLS) which is available through the website www.epls.gov

POLICY FOR USE OF UNIVERSITY NAME, LOGOS, FAMILY OF MARKS

The University of Louisiana at Lafayette administers a licensing program to effectively manage the use of its name and visual identify. Through this program, all uses of UL Lafayette’s name, department names, nicknames, logos, and visual marks (including the Ragin’ Cajun family of marks) must be approved by UL Lafayette’s Office of Communication and Marketing.

Any individual, organization, or company wishing to produce goods bearing the name or identifying marks of UL Lafayette **MUST** obtain a license to do so. Producing goods bearing the name or identifying marks of the University without a license is illegal.

Contact the Office of Communication and Marketing, 337/482/6397, for further details.

ON CAMPUS PURCHASES

Requisitions for items from the **PC Depot and the Bookstore** are also to be approved by Administration and Finance then forwarded to Purchasing. PC Depot requisitions are forwarded to Computer Support Services, and Bookstore requisitions are returned to the department for further processing.

REPAIRS AND REPLACEMENT PARTS

Repair of equipment:

All requisitions for repairs need to include:

- a) name of the item,
- b) make or manufacturer of item,
- c) model number,
- d) serial number,
- e) State of Louisiana tag number,
- f) location (building & room number) of the equipment needing repair,
- g) original value of the equipment - needed for insurance purposes,
- h) vendor's full name and street address,
- i) vendor's return authorization number (if supplied by the vendor),
- j) name of the vendor's contact person,
- k) problem you are having with equipment,
- l) any special shipper if a shipping order is also needed,
- m) name and phone number of department's contact person for vendor to question further if necessary,
- n) YOUR estimate of the repair cost.

The requisition must clearly state if you are requesting **only an estimate to repair**.

A Purchase Order for repair or for an estimate to repair will be issued.

Replacement parts for equipment:

Requisitions for replacement parts for EXISTING equipment must show the make, model number, and serial number of the EXISTING equipment for which parts are requested. The parts requested must be identified by the part number from the manufacturer's parts list.

UNAUTHORIZED PURCHASES

The procurement of outside goods by means other than via the Purchasing Department is not authorized unless specific written authorization is obtained. Requisitions that split large purchases into smaller purchases in order to circumvent purchasing procedures **are illegal**.

Unauthorized purchases may become the personal responsibility and liability of the person(s) making the purchases.

Vendors have been advised that purchases chargeable to the University must be authorized by a properly executed University Purchase Order.

SMALL ENTREPRENEURSHIP/VETERAN-OWNED AND SERVICE-CONNECTED DISABLED VETERAN-OWNED PROGRAMS

The University of Louisiana at Lafayette is a participant of the Small Entrepreneurship (SE) Program (the Hudson Initiative) and the Veteran-Owned and Service-Connected Disabled Veteran-Owned (LaVet) Small Entrepreneurships Program. Bidders are encouraged to consider participation. Information is available from the Office of State Purchasing and Travel's website at <http://doa.louisiana.gov/osp/se/se.htm>.

COST ANALYSIS

The Purchasing Department compares price quotations submitted with market prices and other indicators, including discounts. Elements of cost are analyzed to determine if reasonable, allocatable and allowable. These analyses are done at all levels of procurement within the Purchasing Department.

Recycled Materials for Federal Grants.

Pursuant to 40 CFR 30.16, State and local institutions of higher education, hospitals, and non-profit organizations that receive direct Federal funds shall give preference in their procurement programs funded with Federal funds to the purchase of recycled products pursuant to EPA's guidelines.

Lease Vs. Purchase for Federal Grants.

Where appropriate, an analysis is made of lease and purchase alternatives to determine which would be the most economical and practical procurement for the Federal Government.

Federal Preaward Review Provision

Recipients shall, on request, make available for EPA, pre-award review and procurement documents, such as request for proposals or invitations for bids, independent cost estimates, etc., when any of the following conditions apply.

- (1) A recipient's procurement procedures or operation fails to comply with the procurement standards in EPA's implementation of Circular A-110.
- (2) The procurement is expected to exceed the small purchase threshold fixed at 41 U.S.C. 403 (11) (currently \$100,000) and is to be awarded without competition or only one bid or offer is received in response to a solicitation.
- (3) The procurement, which is expected to exceed the small purchase threshold, specifies a "brand name" product.
- (4) The proposed award over the small purchase threshold is to be awarded to other than the apparent low bidder under a sealed bid procurement.
- (5) A proposed contract modification changes the scope of a contract or increases the contract amount by more than the amount of the small purchase threshold.

INSTRUCTIONS - HOW TO COMPLETE THE REQUISITION FORM

A standard University Purchasing Requisition form (copy attached) is used to request the Purchasing Department to order materials and contract for services. The University will assume no obligation except on a duly authorized Purchase Order. The following will facilitate the processing of requisitions for your department and will enable the Purchasing Department to expedite your request. REQUISITIONS NOT COMPLETED PROPERLY WILL BE RETURNED TO THE ORIGINATING DEPARTMENT WITHOUT FURTHER PROCESSING...

A. DEPARTMENT:

Enter originating department.

B. CONTACT PERSON:

Enter individual's name within your department who can be contacted to answer pertinent questions about product(s) or service(s) being requested.

C. TELEPHONE EXTENSION:

Enter telephone number of contact person.

D. DATE:

Enter date requisition is typed.

E. ITEM NO:

Number each item in sequence beginning with number "1", double spacing between each item. If more space is needed, attach another sheet (s) marked "REQUISITION NO. CONTINUED" (**NOT ANOTHER REQUISITION**). Don't forget you will need an original and two (2) copies.

F. QUANTITY AND UNIT:

Show how many of each item is requested. The quantity unit of an item must also be supplied such as 1 only, 1 pkg, 1 bu, 1 crtn, 1 case, 1 lb, 1 doz, 1 ft. 1 yd, 1 copy, etc.

G. DESCRIPTION AND COMPLETE SPECIFICATIONS:

Name and describe each item in detail. Name the item FIRST, then give a detailed specification. Enter catalog number and trade name, if known, at the end of the description. Detailed specifications will effect better competitive bids and insure the purchase of the quality, merchandise desired and/or will serve as a basis for rejecting merchandise delivered not meeting the specifications. **In special cases when a substitute is not acceptable, a statement giving the reasons for this request MUST BE SHOWN in this section stating unique features and why they are needed and why competing products will not be satisfactory.**

H. UNIT PRICE:

Enter the probable unit price. If written quotations were obtained, attach to white copy of requisition.

I. AMOUNT:

Extend the quantity times the unit price and enter the product in this column.

J. PURPOSE:

Enter the general purpose of the item(s) if this is not evident from the description. Specific projects should be identified.

K. TOTAL:

Enter estimate of total expenditure for this requisition. It is very important that an estimate of total costs be given so that Business Services knows upper limits of this expenditure.

L. NAMES AND ADDRESSES OF VENDORS:

List one (1) source for total expenditure up to \$5000.00, three (3) for total expenditure from \$5000.00 to \$15000.00, and five (5) or more for total expenditure over \$15000.00 except if state contract. List complete vendor names and addresses including zip codes and phone numbers if known.

M. 'FUND' 'APP'N' 'SEC' 'ACT' 'EXP CODE':

Enter complete appropriate account number, including the prefix number or letter and the object classification. All items of same category should be submitted on one requisition. Items of different categories **are not** to be submitted on the same requisition.

N. REQUESTED BY-APPROVED BY:

Authorized person must sign in order to validate the requisition. Stamped signature **not desirable** but if used should be **countersigned, not initialed** by authorized person.

O. FUNDS AVAILABLE:

Completed requisition forms, yellow and white copies, are to be forwarded to Business Services for approval of funds, then forwarded to the Purchasing Department for processing. The pink copy is retained by the originating department, except for Bookstore purchases....

FOR ADDITIONAL INFORMATION:

The Purchasing Department personnel will assist with any additional information needed to locate sources of supply, furnish cost estimates, specifications, etc.

Also, If information is desired concerning a system of filing requisitions and orders, the personnel of the Purchasing Department will be glad to assist you.

Your inquiries are welcome.

PURCHASING DEPARTMENT PERSONNEL
MARTIN HALL, ROOM 123
(337) 482-5396
FAX – (337) 482-5059
EMAIL: PURCHASING@LOUISIANA.EDU

TITLE	NAME	PHONE NUMBER
Director of Purchasing		
Asst. Director of Purchasing	Lark Chartier	2 - 6239
Procurement Specialist 2	Kristi Montet	2 – 5201
Procurement Specialist 2	Josie Mariano	2 - 6243
Purchasing Technician II	Mary C Borel	2 - 6244
Administrative Asst. III	Judy Harvey	2 - 5396