

PROCUREMENT PROCEDURES

The Procurement Services department is to establish and administer purchasing practices and procedures, institute necessary reports, arrange and approve term contracts, consolidate purchases of like or common items, and generally obtain savings for goods and services for the campus community. The University of San Diego is subject to and complies with all applicable laws and regulations governing purchasing practices.

Procurement Services has the final responsibility for obtaining prices and conditions of the sale for all purchases and contemplated purchases by the University of San Diego.

SECTION I – GENERAL PROCUREMENT GUIDELINES:

Procurement Services has compiled a listing of commonly procured goods and services by the campus community that can be found [on our website](#).

Goods and services and all tangible/non-tangible items follow the below guidelines for procurement. Keep in mind that all purchases over \$5,000 will need a Purchase Requisition (PR) and a Purchase Order (PO) in Workday:

Dollar Threshold	Method to Pay
Under \$5,000	Use Purchasing Card or One Card to make purchase. Use the catalogs available at the USD Marketplace: <i>Sandiego.edu/procurement/USDMarketplace</i>
\$10,000 - \$250,000	Requires a Purchase Requisition (PR) in Workday and a minimum of 3 quotes to establish a PO. Initiate PR following instructions on the Requisition Quick Reference Guide for Workday. Use the “Supplier Invoice Request process through Workday to submit invoices once goods are received. Quotes can be obtained through the “Request Quote feature at the USD Marketplace <i>“Sandiego.edu/procurement/USDMarketplace.</i> Purchasing Groups and consortiums may be used without the need for further competition.
Over \$250,000	Requires a Purchase Requisition (PR) in Workday. Initiate PR following instructions on the Requisition Quick Reference Guide for Workday. Attach a detailed Statement of Work or Specifications to the requisition request in Workday. Do not attach quotes or contracts.

Technology Purchases

- **Computers, Laptops, iPads and other technology hardware.** All computer hardware must be ordered through ITS or be given ITS approval, per Purchasing Policy 2.10.2. Please email crp@sandiego.edu for more information or visit the [ITS webpage](#) for detailed information.

PROCUREMENT PROCEDURES

Copiers and Printers

- **Copiers, Printers, Fax Machines, Multi-Function Printers (MFP's)**. All printers/copiers must be ordered through ITS or been given ITS approval, per Purchasing Policy 2.10.2. Please email prp@sandiego.edu for more information or visit the [ITS webpage](#) for detailed information on the printer replacement program.

Furniture Purchases

- **Furniture**. The Office of University Design attempts to maintain consistency of its Spanish Renaissance architectural statement in the exterior and interior public areas of its buildings. As such, furniture guidelines have been developed by the Office of Design to conform to university standards. All furniture purchases must be managed through Procurement Services to maintain these guidelines and standards.

SECTION II – COMPETITIVE BIDDING PROCEDURES

Goods and services are to be procured on a competitive basis whenever possible. In complying with these requirements, procurement staff shall ensure compliance with all applicable federal, state or local laws, and shall encourage the participation of small, veterans, women, minority, and locally owned small businesses, in the procurement process and, to the extent legally possible, give preference to small and local businesses. The competitive procurement requirements can be satisfied through *informal or formal bidding* as defined below.

Informal Bidding. For goods and/or services estimated to be below \$250,000, a competitive procurement process may be conducted by email, internet quotes, or other means and under conditions different from those required for formal bidding. Contract award is usually made on the basis of price to the lowest bidder who is both responsive (complies with the stated specifications) and responsible (competent and otherwise qualified to perform under any resulting contract), but can also be made based on best value. **A minimum of three (3) quotes are required.**

Formal Bidding. Formal bidding is a competitive procurement process in which prospective bidders respond to a solicitation. The process is used when: (i) the proposed contract amount is estimated to be above \$250,000 and (ii) the specifications can be sufficiently defined and detailed to assure the procurement of appropriate and acceptable item(s) or service(s). A Request for Proposal (RFP) is usually the solicitation vehicle for this method of procurement but each project will differ so the procurement team determines the best approach to meet formal bidding requirements. Bids must comply with the specifications, terms, and conditions for the goods or services stated in the solicitation. Contract award can be made on the basis of price to the lowest bidder or based on best value.

Exemption from Competitive Requirements

The competitive procurement requirements may not apply, under the particular circumstances of the procurement, if an exception is warranted. The following examples are illustrative of circumstances that may be considered in authorizing case-by-case exceptions.

PROCUREMENT PROCEDURES

- 1) **Public Exigency**: An emergency situation when the health and safety of the public or persons in the custody or care of the University are at risk if immediate measures are not taken to resolve the problem/situation and it is not possible or practical to go through a competitive process.
- 2) **Single or Sole Source**
 - a) **Single Source**: A procurement process in which item(s) or service(s) are procured from, or are a product of either:
 - A single source of supply not selected through a competitive procurement process; or
 - A single manufacturer, even though the items or services may be procured through a competitive procurement process (i.e. limited competition among dealers and distributors)
 - b) **Sole Source**: Only one person, firm or manufacturer exists that can provide the needed item or services, and no equivalent person, firm or manufacturer is available that would meet the best interest of the University such as quality, schedule, standardization/interoperability or continuity of service. Competition is precluded because of the existence of patent rights, copyrights, secret processes, control of the basic raw material(s) or similar circumstances, and there is no equivalent item or service.
- 3) **Absolute Compatibility**:
 - a) The procurement is for replacement parts or components for equipment, and no information or data is available to ensure that the parts or components obtained from another supplier will perform the same function in the equipment as the part or component to be replaced.
 - b) The procurement is for replacement parts or components for equipment, and the replacement parts or components would compromise the safety or reliability of the product, or would void or invalidate a manufacturer's warranty or guarantee; or
 - c) The procurement is for upgrades, enhancements or additions to hardware or for enhancements or additions to software, and no information and data is available to ensure that equipment or software from different manufacturers or developers will be as compatible as equipment or software from the original manufacturer(s) or developer(s).

SECTION III – PROCEDURES FOR MODIFYING PURCHASE ORDERS

Changes or Cancellations to a Purchase Order: If you wish to modify or cancel a purchase order once it has been issued, you must use the Change Order Requisition Type and change order process through Workday.

PROCUREMENT PROCEDURES

Supplier Orders Timeline

All approved Purchase Requisitions will be processed within twenty four (24) hours or within 2 business days. If a special circumstances or handling requirements preclude processing within this timeframe, the originating department will be notified. Completed purchase orders will be emailed directly to the supplier from Workday.

Receiving

Upon receipt of merchandise, please be aware of the following:

- a. It is the responsibility of the ordering department to immediately inspect the contents for damage as well as order completeness and accuracy
- b. In the event of damage or order discrepancies on purchase orders, it is the responsibility of Procurement to notify the supplier for resolution. Be aware that the return policy for each supplier will be different and there may be restrictions on when goods can be returned. Contact Procurement immediately if an item needs to be returned.

Supplier Payments

Follow the instructions on the Quick Reference Guide to submit a Supplier Invoice Request through Workday. You can find this information at mysandiego.edu/employee/workday.

For payments to independent contractors, an officially approved contract must be on file with Procurement. **If the contract fees exceed \$5,000 a Purchase Order is required**. The Purchase Order must be established prior to receipt of invoices. If reimbursements are part of the contract, it is expected that independent contractors will follow USD Expense Reimbursement Procedures (see Section V. B.) See Human Resources Independent Contractor policy for further detail <http://www.sandiego.edu/legal/policies/community/financial/contractors.pdf>

Supplier Deposits and Advance Payments

Procedures outlined in **Section I** of this document apply to transactions requiring deposits. When a supplier deposit or advance is required, a purchase requisition should be submitted at **least seven working days before the deposit or advance is due**.

PROCUREMENT PROCEDURES

SECTION IV – SUSTAINABLE PURCHASING GUIDELINES

Sustainable purchasing must consider the environment as well as economic and social responsibility as it relates to USD's spending. Sustainable purchasing allows USD to procure goods and services in a way that achieves value for money on a whole life basis, generating benefits not only to the University but also to the society and the economy, while reducing impacts to the environment.

USD's Sustainable purchasing practices prioritize waste reduction in the following order: reduce, reuse and then recycle. Sustainable purchasing then seeks to reduce unnecessary purchasing first, then prioritize purchase of multiple use products or surplus products, before looking at recyclable or otherwise sustainable products.

Please see our "**Sustainable Purchasing Guidelines**" for more information on "Green" and "Sustainable" spend.