Welcome to Procurement Networking

Post in the Chat

Your Name

Where you work

How long you have been at UF
Topic Overview

1. Brief high level overview of Procurement (purchasing)

2. Small Group Work
   - Learners post questions and responses in the chat.
   - Practice searching resources (website, toolkits)
   - Learn where to find some of the answers
   - Learners will figure out the activity answers in a small group.

Use the chat or unmute to ask questions.

Be sure to take your own notes.
Who/what is Procurement?

Procurement Services – purchase of goods and services

UF Procurement’s vision is to set a standard of excellence by creating partnerships with customers and leading innovatively in strategic sourcing, contract management and efficient procurement processes to facilitate the UF mission and create outstanding value for the University

Our role: to provide: Service, ensure UF receives best value and to mitigate risk

- Primary contracting authority for the University
- Sole department with signature authority for purchases
- Handles public solicitations which result in contracts used by UF
- ~ 100,00 PO’s/year = ~ $600 million + PCard
- Reports directly to the CFO
- UF and BOG Regulations govern
- Florida Statute and Federal Uniform Guidance also govern

Staff listing on Procurement.ufl.edu/about-us
How do you know what we do?

**Office team**
- Office supplies
- Hardware
- Software

**Research & Scientific**
- Fisher Scientific
- Airgas

**MRO/Minor Construction**
- Electric charging stations
- Lightbulbs & tissue

**Services/Events**
- Dining Services
- Printing/Copying
Why learn about purchasing?

- How to get what your unit needs
- Best value
- Business process
- Good stewards of public funds by knowing the rules
- Getting what you want within the rules – so it will be faster
Starting a purchase

What do you need? Has it been purchased before? How?

- **PCard // Unencumbered // Requisition-PO**

  - **PCard** – for low dollar purchases or travel – *fiscal on-boarding class*
    (List of allowable PCard purchases on PCard webpage under Procedures)
  
  - **Unencumbered** – short list of things paid without a PO
    (List available on Disbursements website under "Allowable Unencumbered Expenditures")
  
  - **Purchase orders are required at $5,000 and up**
    - Does UF have an existing contract supplier?
    - Check myUF Marketplace, Procurement website
    - Contact Procurement Agents – Procurement@ufl.edu
Quote Thresholds

• Up to $10,000 – No additional quotes required
  • PO required & Asset threshold: $5,000
  • Best business practice: always get quotes
• $10,000 - $149,999 – Three competitive quotes
• $150,000 and above – Required*: Public Competitive Solicitation

*Board of Governors (BOG) & UF Regulation require public solicitation at $150,000 and up
<table>
<thead>
<tr>
<th>Form Name</th>
<th>Non-Catalog Item Form</th>
<th>Standard Service Request Form</th>
<th>Amount Only Request for Goods Form*</th>
<th>Confirmation Purchase Request Form</th>
<th>Household Moves Form</th>
<th>UF Subcontract Form</th>
<th>Enabled Vendor Quote Form</th>
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</thead>
<tbody>
<tr>
<td>Appropriate Use</td>
<td>Use to order goods that are not available in the E-Catalog -- <strong>non-Enabled vendors only</strong></td>
<td>Used for ALL Types of Service</td>
<td>Used for Blanket Orders For Goods; Minimum $1000.00, Good for One Year Only, <strong>Cannot Be Used for Enabled Vendors</strong></td>
<td><strong>Used Only When An Invoice Has Been Received For Goods/Services</strong></td>
<td>Use To Request Household Goods Moves For Staff And Faculty</td>
<td><strong>Contracts And Grants Use Only</strong></td>
<td><strong>Used Only With Enabled Vendors For Products That Cannot Be Purchased Through The E-Catalog Or Punch-Out Websites</strong></td>
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<tr>
<td>Examples</td>
<td>Equipment Computers Copier purchase Machinery Sole Source Vehicles</td>
<td>Advertising Catering Consultants Copier maintenance agreements Document destruction Dues and Memberships Lab fees and services Lease of space/land Printing Temp services</td>
<td>Only non-Enabled vendors including but not limited to: Publix Home Depot Lowes Animal feed Clothing/uniforms Dental appliances Food items Kitchen supplies</td>
<td>Emergencies Where Purchasing (or someone with delegated authority) has executed a contract Household relocations for Staff/Faculty</td>
<td>Subcontracts Where the Department of Sponsored Research (or delegated office) has executed a contract</td>
<td>Items specially priced for your department/lab or products that cannot be obtained on the vendor’s punch out website Lab equipment Machinery Special orders</td>
<td></td>
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*As new vendors are Enabled in myUF Market, no blanket POs will be allowed
### Key Terms

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
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<tr>
<td>myUF Marketplace</td>
<td>shopping; request PO &amp; pay bills</td>
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<tr>
<td>Requisition request for PO</td>
<td>Request for PO</td>
</tr>
<tr>
<td>Purchase Order “PO”</td>
<td>Legally binding contract between UF &amp; supplier</td>
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<td>Encumbrance</td>
<td>Sets aside funds to be used specifically</td>
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<td>Regulations</td>
<td>UF BOT and BOG</td>
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<tr>
<td>Public Solicitation</td>
<td>Formal process for getting quotes/proposal from suppliers</td>
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<tr>
<td>Quote or Proposal</td>
<td>Supplier response to a request for pricing</td>
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Working with Procurement

Classes to take:
- Color of Money – Pro302
- Procurement 101 – Pro305
- Intro to Purchasing in myUF Marketplace – PST073
- PCard (see fiscal onboard class or PCard website)
- Procurement 102 – Service Contracts – Pro352

Information to know: Chartfields and Budgets
- General Accounting website – Chartfield Overview & instruction guide
- Budget & Commitment Control – instruction guides

Security Roles – myUF Marketplace
- UF_N_MKT_REQUESTOR
- UF_N_MKT_APPROVER
We are all financial stewards

**Transaction Processors**
- Know the rules
- Create requisitions
- Pay invoices
- Process PCards

**Decision makers**
- *May* know the rules
Reporting Fraud

If you are not sure if fraud is happening, talk to someone in Finance & Accounting, a trusted advisor, a supervisor, or someone you trust.

To report potential legal, policy, or ethical conduct violations or concerns.

Anonymous Compliance Hotline: 1-877-556-5356

University of Florida Compliance Hotline:
https://compliance.ufl.edu/uf-compliance-hotline-2/

UF Controller’s Office: 352-392-1321
Group Exercise

https://procurement.ufl.edu/

1. Where can I find a list of suppliers who can print documents for UF?
2. What is a Commodity Code?
Practice Time

This exercise is designed to help you learn how to search our website to find answers to some common questions.

Search for answers to at least one question. Post answer in the shared Word Document.
Exercises

Post your answers to the document.

1. Where can I find a list of suppliers who can print documents for UF?
2. What is a Commodity Code?
3. Where do I find “How to fix a Rejected Requisition” information?
4. What is needed when buying software?
5. How do I buy a car/vehicle?
6. How do I know what kind of Form to use in myUF Marketplace (when not using an e-catalog)?
7. What are the quote / bid thresholds?
8. How do I buy office furniture?
9. How do I make a change to a purchase order?
Zoom Breakout Room

1. Self-select your “room”
   a) Last names A-H in Group 1
   b) Last name J-W in Group 2

2. Open your chat within the video call and say Hello

3. Solve Scenarios together in Breakout Room

SMEs will check into your rooms to see if you have questions.
Exercise Instructions

1. Read each scenario
2. Answer the discussion questions for each part
3. Be ready to share out
Scenario #1

Your building’s Facilities Manager has given you a quote from Cummins Power Generation for a 50kW Natural Gas and Propane Liquid Cooled Generator. The total amount of the quote is $16,688.00.

1. Are additional quotes required?
2. What forms should be used in myUFL Marketplace?
3. What is the commodity code?
Scenario #2

You are given three quotes from a Principal Investigator (PI) for a fancy new microscope. The quotes received are from Leica, Nikon, and Micro Optics of Florida. Your PI wants to purchase the new scope from Leica. The total amount of the quote is $160,000.00

Hint: read the Procurement website (search Microscope)

Q1. What is needed for purchases over $150,000?

Q2. What form should be used in myUF Marketplace? (what account code?)
Scenario #3

One of your labs was awarded a grant on Federal Funds, Fund 201. In the grant budget proposal, there is a line for Consulting Services. The PI wants to use University of Virginia for the services. The quote is for $25,000.00.

1. Are additional quotes required?

2. What forms should be used in myUFL Marketplace?
Whole Group

Return to the main Zoom Room.
Use the chat or unmute to share your answers to the scenarios.
1. What was your biggest takeaway from today’s session?

2. What information from today’s session do you think you might use in your job? What would you like to learn more about?
   
   • Use the chat or unmute to share your answers.
Questions
Thank you for attending!

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