

# OVERVIEW

# Swarthmore College Purchasing Policy

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# Learning objectives

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1. Provide an overview of purchasing services
2. Policy and procedure highlights
  - a. Purchasing policy
  - b. Uniform Guidance
  - c. Sustainable Purchasing
  - d. Small Business / Diversity
3. Communicate how the purchasing office serves the College community
4. Going forward...



# What is purchasing

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- Service-oriented department
- Codify what is already existing
- Differentiate between goods (products) and services (contracts)
  - Similar process – but contract commitments are not ready
- Purchase-to-pay process
  - Vendor qualification
  - Buy
  - Receive
  - Pay







PULLING COLLECTIVE IDEAS INTO ONE COLLEGE PLAN

# Purchasing policy overview

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- $\geq$ \$10,000
  - Purchase Orders that flow into Banner
    - System of record
    - Associated with PO Terms and Conditions
  - 3 Quotes or use a Sole Source Justification
- Purchasing approval matrix
  - Moving approval from invoice to purchase order



# Purchasing policy approval matrix and workflows

Purchasing Policy for Supplies and Non-Professional Services						
	Required Per Order Amount					
	\$0 - \$2,499	\$2,500 - \$9,999	\$10,000 - \$49,999	\$50,000 - \$249,999	\$250,000 - \$1M	> \$1M
College PCard <sup>(1, 2)</sup>	X					
Direct Bill / Check Req. <sup>(2, 3)</sup>	X	X				
eMarket Portal <sup>(2, 3, 4)</sup>	X	X	X	X	X	X
Three Quotes & a PO Required <sup>(2, 5)</sup>			X	X	X	X
<b>Approvals Required</b>	<b>\$0 - \$2,499</b>	<b>\$2,500 - \$9,999</b>	<b>\$10,000 - \$49,999</b>	<b>\$50,000 - \$249,999</b>	<b>\$250,000 - \$1M</b>	<b>&gt; \$1M</b>
Delegated Authorized Approver or Financial Manager	X	X	X			
President's Staff				X		
Associate VP for Sustainable Facilities Operations & Capital Planning					X	
President or Vice President for Finance						X
<b>Footnotes</b>						
<sup>1</sup> The standard PCard transaction limit is \$2,500						
<sup>2</sup> Purchase Orders are required to facilitate approval for the following:						
- Furniture requires approval from Facilities						
- Computer, software, and printer acquisition require ITS authorization						
- Hazardous materials purchases require approval from EH&S						
- Grant account purchases require approval from the Business Office Grant Administrator. Purchases of \$10,000 or more require three quotes. Check vendor status on sam.gov.						
<sup>3</sup> Quotes should be attached to PO (Required for orders >\$10,000)						
<sup>4</sup> eMarket Portal includes punch-out catalogs, hosted catalogs, and non-catalog orders						
<sup>5</sup> Consult with the Purchasing Office for RFP or GPO process details						
<b>Professional Services</b> (Consultant, Events, Entertainers, etc: Quotes are not required)						
- Contracts should be sent to <a href="mailto:contracts@swarthmore.edu">contracts@swarthmore.edu</a> for review						
<b>Blanket PO Authorization Process</b>						
- The total amount of the blanket order will be used to determine authorizations.						

## purchase order



MSC Industrial Supply  
75 Maxess Road  
Melville, NY 11747-3151  
United States  
Attn: E-Commerce Support  
Phone: (800)753-7970

Date: 11/06/2018  
Purchase Order #: P0003068  
Transaction #: 1319813  
Requested By: Patti Braun-Service Bldg  
Requester Email: pbraun1@swarthmore.edu  
Phone: 610-328-8289  
Authorized By: Beth Baksi-Room 121  
Blanket Order:

**Ship To**  
Swarthmore College  
SERVICE BLDG  
500 COLLEGE AVENUE  
SWARTHMORE, PA 19081  
United States  
Attn: Joe Havens-Service Bldg  
Phone: 610-328-8289

**Bill To**  
Swarthmore College  
SERVICE BLDG  
500 COLLEGE AVENUE  
SWARTHMORE, PA 19081  
United States  
Attn: Patti Braun - Service Building  
Phone: 610-328-8289

**Order Comments:** Pricing per MSC Industrial Punchout 11/06/18

Request per B. Devlin (per J. Havens) to restock  
Rubber Coated Shoe Cover Boots for Stockroom  
Repl. for Ironwear 9260 previously ordered.

Line #	Item#	Description	UOM	QTY	Unit Price	Line Total
1	93182699	Men's XL Women's 1214 Chemical Resistant Overboots  Ship To Attn: Joe Havens-Service Bldg MFG/Provider: NA MFG/Provider Part: NA Work Order: 173756 Category/Course: Maintenance/General Stockroom	EA	12	7.24 USD	86.88 USD
<b>Subtotal:</b>						86.88 USD
<b>Tax:</b>						0.00 USD
<b>S &amp; H:</b>						0.00 USD
<b>Order Total:</b>						86.88 USD

### General Terms

1. By accepting this PO, Supplier certifies that they are not a federally debarred or disqualified supplier.
2. The [Swarthmore College PO Terms and Conditions](#) can be found online.
3. Specific information [for suppliers](#) doing business with the College will also be found online.
4. Invoices should be sent to the requisitioner and the above **PO number must be included on all invoices**. Failing to follow these instructions will delay payment.

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# What does our purchase order look like?

- Contact information
  - Supplier
  - College ship-to
  - College bill-to
- General information
  - PO number
  - Requisitioner and approver
  - Product quantity, price, and description
  - Order Comments
- General Terms
  - Supplier certifies that they are not a federally debarred or disqualified (System for Award Management – [sam.gov](http://sam.gov))
  - Swarthmore [College PO Terms and Conditions](#)
  - Specific information [for suppliers](#)
  - PO number must be included on all invoices





# Suppliers will sharpen their pencils

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- Purchases  $\geq$ \$10,000
  - Obtain 3 quotes
  - Check group purchasing organizations
  
- Best value
  - Price
  - Schedule
  - Quality
  - Qualifications/Performance
  
- Scope
  - Products
  - Services
  - Software

# Uniform guidance procurement standards for fed grants

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- Documented purchasing policy
- Threshold changes
  - Micro-purchase <\$10,000
  - Small purchase <\$250,000
  - Sealed bids and competitive proposals  $\geq$ \$250,000
- Consideration of small and diverse suppliers
- Sole source justification (unique, no competition, authorized by agency, public emergency)
  - Conflict of interest policy
- Additional contract provisions



# Sustainable purchasing

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- President's Sustainability Research Fellow (PSRF) Program
  - Vision and guiding principles
  - Sustainable Printer Purchasing Policy
- Purchasing office collaborates with sustainability initiatives
  - Travel (air miles)
  - Copy paper & sustainable printing instructions
  - Catering
  - Vehicles
- Suppliers
  - Encourage suppliers to identify their business' sustainability efforts
  - Identify sustainable products for community members



# Small business / diversity procedures

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- Certification definitions
  - Small business
  - Disenfranchised business
  - Diversity designations
- Differentiate between
  - Tier 1
  - Tier 2
- Purchasing office responsibilities
- Additional resources



# Currently registered small/diverse suppliers

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- eMarket Portal
  - Complete Book and Media
- Events Management
  - Visual Sound (AV)
- Facilities and EVS
  - Cicada Architectural Planning
  - John Savoy Contract Furniture (for residence halls)
  - T. Fran McCalls (janitorial paper)
- Science
  - EMSCO Scientific
  - Neta Scientific



# How do purchasing staff assist community members?

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- College's strategic responsibilities
  - Environmental
  - Social
  - Fiscal
- Compliance with laws
  - New for 2018
    - Relocation expenses
    - Act 43 for PA State
    - General Data Protection Regulation (GDPR)
    - Uniform Guidance Procurement Standards
- Provide resources
  - [Buyers Guide](#) (GPS for purchasing)
  - [Purchasing Resources](#) shared Google folder
  - [Website](#)
  - [PCard program](#)



# Going forward...

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- Workflows - contact to be made by department to set up
- Log-on – increased number of eMarket Portal users to authorize orders
- Training – regular training sessions and supplier presentations for community members
- Glossary of terms



Questions?

