General Purchasing Information

INTRODUCTION

This section provides general information regarding WSU purchasing. For specific procedures, refer to the BPPM Chapter 70 Table of Contents (BPPM 70.00).

NOTE: Washington State University has elected to defer implementation of federally-funded purchase regulations under 2 CFR 200 until July 1, 2018; until such time the University will continue with such procurements under OMB Circular A-110.

PROCEDURES

General Procedures

The University provides several purchasing methods. Refer to Table 1 to determine which method to use. Use the applicable procedure that is closest to the top of the table.

Table 1

<table>
<thead>
<tr>
<th>Description</th>
<th>BPPM Reference</th>
<th>Form Used</th>
<th>Restrictions/Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Interdepartmental purchases from University sources</td>
<td>70.05</td>
<td>Interdepartmental Requisition and Invoice (IRI)</td>
<td>Buy from WSU departments authorized to sell goods and services. See also 30.15.</td>
</tr>
<tr>
<td>Small purchases</td>
<td>70.08</td>
<td>Purchasing Card</td>
<td>See 70.08.</td>
</tr>
<tr>
<td>Blanket purchases from specified vendors</td>
<td>70.19</td>
<td>Vendor's invoice</td>
<td>See 70.19 for vendors and amounts. Refer to the blanket agreement for additional restrictions.</td>
</tr>
<tr>
<td>Purchases from outside vendors</td>
<td>70.07</td>
<td>Department Order</td>
<td>See 70.07 for limits and restrictions.</td>
</tr>
<tr>
<td></td>
<td>70.10</td>
<td>Departmental Requisition</td>
<td></td>
</tr>
<tr>
<td>Confirming purchases</td>
<td>70.20</td>
<td>Departmental Requisition or State Invoice Voucher</td>
<td>Personal liability of the purchaser until approved by the employee's department and Purchasing Services.</td>
</tr>
</tbody>
</table>

Special Procedures

A few special procedures are listed in Table 2, refer to BPPM 70.00 for more.
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Table 2

<table>
<thead>
<tr>
<th>Description</th>
<th>BPPM Reference</th>
<th>Form Used</th>
<th>Restrictions/Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alcoholic beverages</td>
<td>70.29</td>
<td>Banquet Permit</td>
<td>To purchase alcohol for University functions.</td>
</tr>
<tr>
<td>Cash advance</td>
<td>40.21</td>
<td>Vendors’ receipts</td>
<td>Used for grants and contracts.</td>
</tr>
<tr>
<td>Purchases from discretionary accounts (program 17A)</td>
<td>70.33</td>
<td>Standard University purchasing forms</td>
<td>See 70.33.</td>
</tr>
<tr>
<td>Carpeting, floor coverings, window coverings, furniture requiring connections to the building or building utilities</td>
<td>80.45, 80.56</td>
<td>Online form: myFacilities website</td>
<td>To obtain indicated commodities.</td>
</tr>
<tr>
<td>NOTE: Does not include purchases by Housing and Dining Services.</td>
<td></td>
<td>(Users who are unable to access the myFacilities website may contact Facilities Services, Operations; telephone 509-335-9000.)</td>
<td></td>
</tr>
<tr>
<td>Personal services</td>
<td>70.50</td>
<td>Departmental Requisition</td>
<td>To obtain services of nonemployees.</td>
</tr>
<tr>
<td>Petty Cash Fund</td>
<td>30.50</td>
<td>Vendors’ receipts, State of Washington Invoice Voucher</td>
<td>For miscellaneous small or emergency purchases.</td>
</tr>
<tr>
<td>Telephone Services</td>
<td>85.39, 85.41</td>
<td>Telecommunications Service Request, Toll Call Authorization</td>
<td>To obtain telephone/network services or telephone calling cards.</td>
</tr>
<tr>
<td>Travel purchases</td>
<td>95.08, 95.20</td>
<td>Travel Expense Voucher</td>
<td>To make purchases while in travel status.</td>
</tr>
</tbody>
</table>

**AUTHORITY**

Purchasing Services is responsible for procurement by purchase, lease, or rental of all materials, services, supplies and equipment required by the various departments of the University regardless of the source of funds.

**GENERAL POLICIES**

Basic requirements are determined by statute and state and University administrative regulations. Purchasing Services has primary responsibility for interpreting these requirements and establishing appropriate guidelines.

**Prior Approval**

To assure compliance with all regulations, all purchases must have the appropriate prior approval. *Any person making an unauthorized purchase must assume full responsibility for that purchase.*
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Purchasing Services' Objective

Purchasing Services' objective is to obtain specified goods and services at the lowest price, maintain quantity and quality, comply with regulations, and spend public money wisely. To achieve this goal, suppliers are contacted locally, in state, out of state, and internationally through the competitive bidding process.

Sole Source

The term "sole source" is defined as a contractor providing goods or services of such a unique nature or sole availability at the location required, that the contractor is clearly and justifiably the only practicable source to provide the goods or services.

Sole source purchases are discouraged because of the lack of competition, which creates the potential for higher prices and terms more favorable to the supplier.

Most sole source purchase requests must be documented by memorandum from the requisitioning department. Some purchase requests that are on the list of purchases exempt from competition maintained by Purchasing Services may not require a sole source memo. Contact Purchasing Services for more information; telephone 509-335-3451. A written quotation or bid must also be obtained by Purchasing Services to substantiate the price, terms, delivery, etc. before an order is committed. All sole source requests are closely reviewed by state and federal auditors.

Small Businesses, Minority Firms

Small business and minority firms are used as suppliers to the extent it is consistent with effective performance policies, particularly in subcontracting under federal contracts.

The University's goal is to increase its percentage dollar volume business completed with such concerns, especially within the state of Washington. A directory published by the state of Washington is available to help identify small business and minority firms.

Vendors providing goods or services to WSU must certify agreement to Executive Order Number 11246, which states a commitment to the active pursuit of equal employment opportunity.

Conflict of Interest

University employees may not participate in purchasing transactions which involve economic benefit to themselves, their immediate families, or businesses with which they are directly associated (BPPM 70.15).

Direct all questions relating to specific transactions which may involve a conflict of interest to the Director of Purchasing Services.
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ASSISTANCE

**Buyers**

Purchasing Services buyers assist departmental personnel in obtaining information about any item.

Employees with departmental purchasing responsibilities are encouraged to discuss questions about purchasing procedures with the buyers. Within state law and regulation and University policy, procedures can be developed to meet special needs, speed purchases and/or cut handling costs.

**Purchase Methods**

There are several ways to purchase equipment and supplies at the University. The method used depends upon the item and its anticipated use. Refer to Table 1 and Table 2, or BPPM 70.00 to find the appropriate procedure.

**STATE PURCHASING**

Some commodities are bid on one bid for the entire state by the State Purchasing Office. The State Purchasing Office advises WSU Purchasing Services concerning acquisition procedures.

Purchasing Services acquires certain services and commodities from state vendor agencies, e.g., State of Washington Central Stores.

**AUXILIARY SERVICES**

Purchasing Services has several auxiliary services. These responsibilities are described in subsequent sections of BPPM Chapter 70. These services include (but are not limited to) relocating employees, coordinating personal services contracts, and licensing and titling motor vehicles.

**SPONSORED PROJECTS**

Sponsored project expenditures are subject to the same treatment as state-appropriated funds. The existing State of Washington Purchasing Policies therefore apply to all such purchases. Federal audits have found these guidelines acceptable.

**Equipment Screening**

Before a requisition is prepared for equipment to be purchased with grant or contract funds, the requisitioning department must review equipment currently available. If the equipment is available, it must not be purchased (BPPM 40.12 and 70.10).

**Prior Review**

The project investigator and the individual with account expenditure authority are responsible for ensuring that all equipment requisitions to be purchased with sponsored funds are in accordance with University, state, and sponsor policies, regulations, and guidelines.
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Special Terms and Conditions

Federal grant-funded purchases are subject to the terms and conditions agreed upon between the University and federal government, which are available from the Purchasing Services website at:

purchasing.wsu.edu/standard-procurement-documents/

Federal contract-funded purchases are subject to the terms and conditions found on the Purchasing Services website at:

purchasing.wsu.edu/standard-procurement-documents/