

General Purchasing Information

NOTE: The website URL for **Workday reference guides** that are referenced in this section is:
<https://confluence.esg.wsu.edu/display/WKB/Workday>

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 implements federally funded procurements in accordance with Uniform Guidance requirements. (2 *CFR* 200)

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

Description	BPPM Reference	Form Used	Restrictions/Explanation
Interdepartmental purchases from University resources	70.05	Interdepartmental Requisition and Invoice (IRI)	Buy from WSU departments authorized to sell goods and services. See also <i>BPPM</i> 30.15.
		Internal Service Delivery (Workday)	See the Workday Internal Service Delivery reference guide for ISD instructions.
Small purchases	70.08	Purchasing Card	See <i>BPPM</i> 70.08.
Purchases from specified suppliers	70.19	Supplier's invoice	See <i>BPPM</i> 70.19 for suppliers and amounts.
Purchases from outside suppliers	70.08	Purchasing Card	See <i>BPPM</i> 70.08 for limits and restrictions.
	70.10	Create Requisition (Workday)	See the Workday Create Requisition reference guide for instructions.

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Special Procedures

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

Table 2

Description	BPPM Reference	Form Used	Restrictions/Explanation
Alcoholic beverages	70.29	Banquet Permit	To purchase alcohol for University functions.
Cash advance	40.21	Suppliers' receipts	Used for grants and contracts.
Purchases from discretionary accounts (Function #FN057)	70.33	Standard University purchasing forms	See BPPM 70.33.
Carpeting, floor coverings, window coverings, furniture requiring connections to the building or building utilities NOTE: Does not include purchases by Housing and Dining Services.	80.45, 80.56	Online form: myFacilities website (Users who are unable to access the myFacilities website may contact Facilities Services, Operations; telephone 509-335-9000.)	To obtain indicated commodities.
Personal services	70.50	Contract Request Form (Workday)	To obtain services of nonemployees.
Petty Cash Fund	30.50	Suppliers' receipts, State of Washington Invoice Voucher	For miscellaneous small or emergency purchases.
Telephone Services	85.39, 85.41	Telecommunications Service Request, Toll Call Authorization	To obtain telephone/network services or telephone calling cards.
Travel purchases	95.08, 95.20	Expense Report (Workday)	To make purchases while in travel status.

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.

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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.*

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.

Objective (cont.)

| Sole Source

The term "sole source" is defined as a supplier 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.

Technology Transfer and Intellectual Property

Licensing out of WSU intellectual property is not a purchase of or contract for goods or services, even if terms in the license impose some commercialization diligence requirements on the licensee, and thus is not within Purchasing Services' purview. (See EP38.) For such transactions, refer to the Office of Commercialization (OC) website at:

commercialization.wsu.edu/

If, notwithstanding the above policy, contracts that license out WSU intellectual property are deemed to constitute a purchase of or contract for goods or services within the meaning of *RCW* 39.26.120(1), the University has determined that requiring a competitive solicitation process is not appropriate or cost-effective for such contracts. Based on this determination and exercising independently in accordance with *RCW* 28B.10.029(1)(a) the powers granted to the Director of the Department of Enterprise

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Technology Transfer and Intellectual Property (cont.)

Services in *RCW 39.26.125(7)*, WSU exempts contracts from the competitive solicitation process that license out WSU intellectual property (IP), including those IP contracts that are deemed to constitute a purchase of or contract for goods or services within the meaning of *RCW 39.26.120(1)*.

Nothing in this policy gives OC purchasing authority otherwise delegated to the Vice President for Finance and Administration, the Contracts and Real Estate Office, or Purchasing Services, which is outside of the licensing out of WSU-created IP and technology or as expressly delegated to the Vice President for Research or the Director of the Office of Commercialization.

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.

Suppliers 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.

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.

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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 Department of Enterprise Services.. The State Department of Enterprise Services advises WSU Purchasing Services concerning acquisition procedures.

Purchasing Services acquires certain services and commodities from state supplier 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 laboratories, 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.

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/StandardProcurementDocuments.html

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

purchasing.wsu.edu/StandardProcurementDocuments.html