

PURCHASING 101

Patty Winkler

Assistant Director, Procurement Services

Texas A&M University

- ▶ Departments have the authority to purchase within their department delegation up to and including \$10,000.00.
- ▶ Departments are still encouraged to obtain bids, including HUB vendors, when possible
- ▶ Utilize the State of Texas, Central Master Bidders List to locate available Texas Certified HUBS -
<https://comptroller.texas.gov/purchasing/vendor/cmbl/>

DEPARTMENT DELEGATION

- ▶ Texas A&M University Procurement Services is contracted by TAMUSA to be your purchasing department.
- ▶ When your purchase is greater than \$10,000.00 – contact Procurement Services
- ▶ If your purchase is a sole source, but is greater than \$10,000.00 – contact Procurement Services
- ▶ If you have a quote/formal contract, but the purchase is greater than \$10,000.00 – contact Procurement Services. DO NOT have a contract signed by Contract Administration UNTIL your purchase has been approved by Procurement Services.

WHERE DOES PROCUREMENT SERVICES FIT IN?

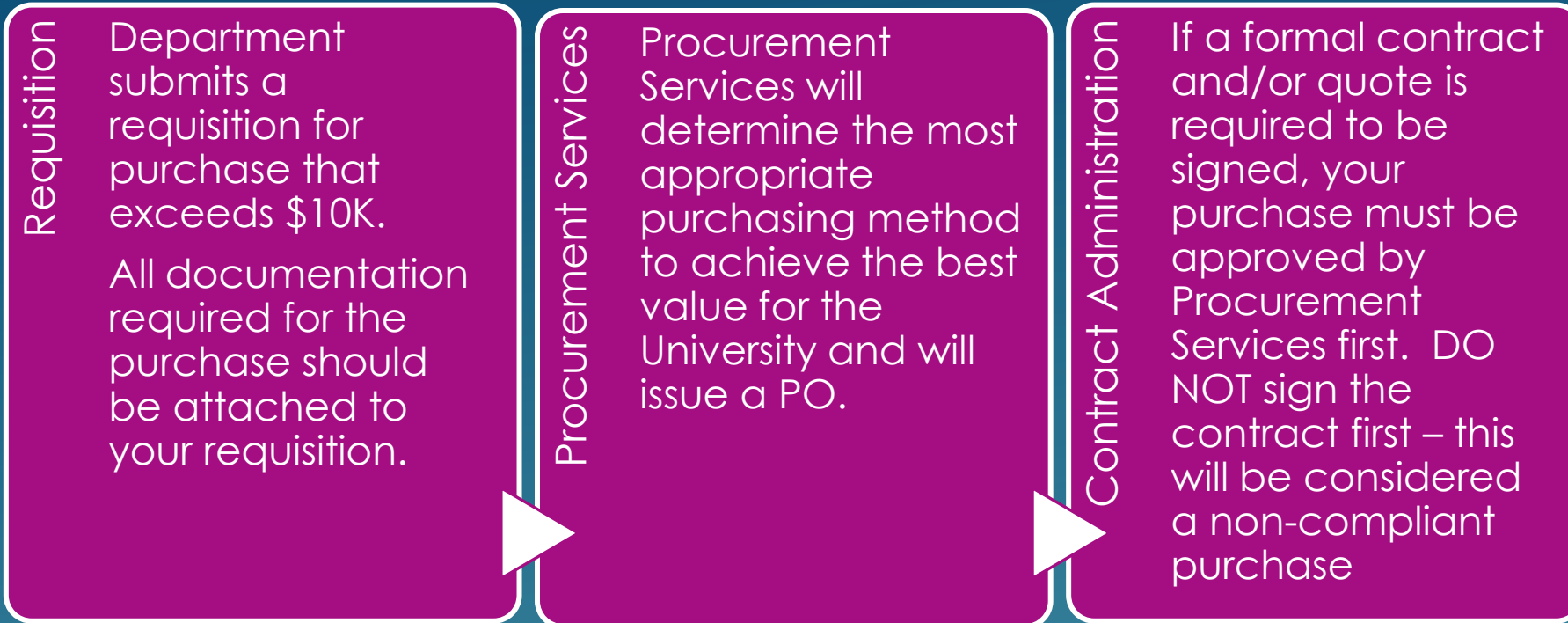
- ▶ This category should only be utilized rarely. There is a time and place for this category. If your purchases follow the correct process, you will have a purchase order to pay against.
- ▶ Examples of when this is a valid category and will not result in a non-compliant purchase.

Making a purchase against a TAMU Master Order (C2023-XXXX)

Making a purchase against an executed formal contract that a PO was not created, but approved by Procurement Services prior to purchase

Exempt Purchase

PAYMENT REQUEST



PURCHASING WORKFLOW

- ▶ We are your FIRST stop for all purchases over \$10K.
- ▶ Procurement Services will review all purchases to ensure the purchase is compliant.
- ▶ We assist with
 - ▶ HUB Subcontracting Plans
 - ▶ Purchasing Cooperatives
 - ▶ Insurance Requirements
 - ▶ IT Accessibility/IT Security (IRIS Approval Emails)
 - ▶ Terms and Conditions (payment terms, freight terms, pricing, etc.)

PROCUREMENT'S ROLE

PROCUREMENT CHALLENGES

- ▶ Purchase outside of the scope of work of an executed agreement.
- ▶ IT Accessibility and IT Security approval must be obtained prior to purchase for applicable items
- ▶ All backup documentation, i.e. quote/proposal, for the purchase must be provided.
- ▶ Procurement Services **MUST** approve the purchase prior to submitting a formal contract to Contract Administration.

- ▶ For purchases made outside of the purchasing guidelines, they will fall into the non-compliant category.
- ▶ A Letter of Non-Compliance will be required that is addressed to Robby Bounds, Executive Director of Procurement Services signed by your department head explaining what happened, why it happened and what steps have been put into place to prevent future non-compliant orders
- ▶ The individual that placed the order will be required to complete Purchasing Training via Train Traq – Course #2112370. Upon completion of the training a confirmation email is provided.
- ▶ Both the letter and the email confirmation is to be submitted with your requisition to Procurement Services for review and approval. Upon approval, the purchase order will be issued for payment to be made.

NON-COMPLIANT ORDERS

- ▶ Please reach out to anyone of the following if you have questions
 - ▶ Patty Winkler, p-winkler@tamu.edu; 979.845.4556
 - ▶ Sean McManis, smcmanis@tamu.edu; 979.845.2139
 - ▶ Cherise Toler; ctoler@tamu.edu; 979.845.5887
 - ▶ Susan King; sa-king@tamu.edu; 979.845.3888

CONTACT INFORMATION

