Training Topics

- Procurement Objective
- Purchasing
- Resources & Procedures
Learning Objectives

AFTER THIS SESSION YOU WILL BE ABLE TO:

- Identify the different methods of purchasing goods and services.
- Choose the best method of procurement for goods and services.
- Recognize the available resources to assist with procurement needs.
Procurement Objective
Procurement Objective

Procurements made on behalf of the University should:

- Use the most appropriate and effective method
- Obtain the maximum value for each dollar of expenditure
- Utilize a competitive basis when purchases exceed $15K

Note: All purchases are subject to applicable laws, UT System policy, and UT Arlington Policy.
Involve Procurement Services early.

This is important when:

- Purchase is complex
- Purchase is high dollar

Require training for all employees who enter requisitions in UTShare.
Purchasing
Approved Purchasing Methods

**ProCard**
- Purchases of $4,000 and less
- Some category restrictions

**Special Item Requisition**
- This is for items that are not available in MAV eSHOP

**MAV eShop**
- On-line portal with direct access ordering from contracted vendors.
**Special Item Requisition**

**No Competition required**
- One-time purchase, under $15,000
- PO Dispatched to Department to send to Vendor

**Informal bids**
- $15,000 up to $50,000
- Can be informal quotes (not published to the public)
- Require a minimum of 3 bids - 2 must be Historically Underutilized Business (HUB)

**Competitive Sealed Bids**
- Over $50,000
- Only handled by Procurement
- Require a minimum of 3 bids - 2 must be Historically Underutilized Business (HUB)

**Request for Proposals**
- Complex/technical requirements
- Multiple ways to achieve the desired result
- Handled by Strategic Sourcing group
- Requires a minimum of 3 proposals – 2 must be HUB.
Current* Campus-Wide Blanket Orders

- Bus charter service
- Temporary employee services
- Office Supplies
- Printing and Promotional Items
- Relocation Services
  *Considered Taxable Income

*This is a partial list - the full list can be found at
State Contracts/Group Purchasing Organizations (GPO’s)

- Department of Information Resources (DIR)
- Texas Multiple Award Schedule Program
- BuyBoard
- E&I Cooperative
- Sourcewell
- Choice Partners
- Education Service Center Region 19
- Vizient

https://www.uta.edu/business-affairs/procurement/Campus-Wide-Contracts/Approved-Group-Purchasing-Organizations.php
UT System Supply Chain Alliance Contracts

Contact Buyer

Contact Contract Specialist

Contract list available

No bidding required
Exclusive Acquisition Justifications (EAJ)

Formerly Known as Sole Source or Proprietary Purchases

Defined as a product or service that has a distinctive characteristic that is not shared by competing products or services. Also, requester must justify why this characteristic is needed.

When the specification limits consideration to one manufacturer, one product, or one service provider, an Exclusive Acquisition Justification Form must be submitted with the requisition. Procurement reserves the right to reject the EAJ request and seek competition.
Emergency Procedures

Unforeseen circumstances requiring an immediate response.

Purchase to prevent a hazard to life, health, safety, welfare, property, or to avoid undue additional cost to the state.

Contact your Buyer if there is time so they are aware.

Requires the submission of Exclusive Acquisition Justification Form with the requisition explaining the emergency.
Service-Related Purchase Orders

On-site service requirements that must be fulfilled prior to issuance of a purchase order:

- Certificate of Insurance from Vendor
- Criminal Background Check Attestation on Vendor’s Employees

The Procurement Office staff will secure these documents from vendor to ensure compliance with UT System policies.
Software, Cloud-Based and On-line Subscriptions

Ensure compliance with all State, Federal and UT System requirements regarding accessibility and information security.

Includes free software as well as subscriptions to on-line databases accessed by faculty, staff, or students.

Approval from the Office of Information Technology (OIT) and the Information Security Office (ISO) before any procurement is made.

May require additional certification through the Department of Information Resources (DIR).
Resources & Procedures
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<th>Resources</th>
<th>Information</th>
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| **Procurement and Strategic Sourcing** | - Office of Procurement Services  
- 817-272-2194  
- procurement@uta.edu |
| **Disbursements (Accounts Payable and Travel)** | - Office of Disbursements  
- Travelservices@uta.edu  
- Accounts_Payable@uta.edu |
| **ProCard**               | - Payment Card Services  
- 817-272-6338  
- paymentcardservices@uta.edu |
| **HUB Program Office**    | - Mario Ramirez  
- 817-272-2140  
- hub@uta.edu |
| **Knowledge Services (UT Share Training)** | - 817-272-2155  
- KnowledgeServices@uta.edu  
- https://resources.uta.edu/business-affairs/training/index.php |
Best Value Procurement Policy
- Procedure BF-PGS-PO-01

Best Value Purchasing Procedure
- Procedure BF-PGS-PR-01

Contracts with Historically Underutilized Businesses (HUB) Procedure
- Procedure BF-PGS-PR-09