PURCHASING TRAINING

PRESENTED BY:
KANSAS STATE UNIVERSITY
PURCHASING OFFICE
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PURCHASING STAFF

- Carla Bishop, Director
- Chris Dekat, Asst. Director
- Cathy Oehm
- Joyce Polson
- Kristin Copeland
GOVERNMENT PURCHASING FUNDAMENTALS

- Competition
- Impartiality
- Maximizing Tax Dollars
- Openness
PURCHASING PRACTICES

- Seek Competition
- Avoid Restrictive Specifications
- Allow Sufficient Time
- Combine Orders
- Stock Items
- No Order Splitting
PURCHASING PRACTICES (CONT’D)

- Responsible Vendor, Low Bid, Meets Specs
- University Departments
- Purchase from Established Contracts
- Approve Invoices in a Timely Manner
- Keep Files for 5 Years
STATE OF KANSAS STATUTES

- KSA 76-769 = Board of Regents Authority
- KSA 75-3317 to 75-3322 = Persons with Disabilities Act
- KSA 45-216 = Open Records Act
- KSA 75-6403 = Prompt Payment Act
- KSA 76-721 & 76-725 = Authority to Contract
WHERE TO BUY?

A. State Use Catalog (Mandatory)
   (www.ksstate.org)

B. Contracts
   (www.ksu.edu/policies/ppm/6312.html)

C. Other State Agencies
   - Kansas Correctional Industries
WHERE TO BUY? (CONT’D)

D. Other KSU Departments
   1. University Printing (Waiver Required)
   2. Facilities (Building & Grounds) (Waiver Required)
   3. Telecommunications (Waiver Required)
   4. K-State Union Computer Store (Apple dealer)
   5. Storerooms (Chemistry, Facilities, etc.)

E. Outside Sources (Bid)
HOW TO BUY?

A. Available from above sources
   1. Place order directly
   2. Send Purchase Requisition to Purchasing

B. Dollar Amount – under $5000? Proceed with order.

C. Solicit Bids – Purchase Requisition if $5000 or more
BID LIMITATIONS

A. Local Authority – Up to $5000 (TOTAL!)
B. KSU Purchasing – Unlimited
C. Board of Regents – Unlimited
D. Procurements & Contracts, Topeka – Resource
KSU PURCHASING PROCEDURES

A. Purchase Requisition, signed

1. Specifications electronically via E-forms

2. List of potential vendors:
   * contact person
   * phone number
   * fax number
   * e-mail
KSU PURCHASING PROCEDURES

B. Purchasing will

1. Review Specifications
2. Order or Contract
3. Delivery
4. Trade-in? Need Disposition of Property form
C. Request for Quotations (RFQ)

1. Post for a minimum of three days.

2. Vendor contact? Call Purchasing

3. Amendments to the RFQ.

4. RFQ’s can be viewed at the following website: www.ksu.edu/purchasing/rfq
KSU PURCHASING PROCEDURES (CONTINUED)

D. Public Opening at 2:00 p.m. on established date.

1. Late bids rejected.
2. Right to accept or reject any or all parts of bid.
3. Right to waive minor technicalities.
4. Bids are reviewed.
5. File sent to department for review.
KSU PURCHASING PROCEDURES (CONTINUED)

E. Recommendation Received
   1. Document reasons for rejecting Low Bids
   2. Delivery
   3. Funding

F. Purchase Order or Contract established.
KSU PURCHASING PROCEDURES (CONTINUED)

G. Product received in good condition.

H. Problems Occur.
   1. Contact vendor first.
   2. Written Complaint
   3. KSU error? Restocking fee & freight.

I. Vendor Protest? Purchasing will be in touch.
KSU PURCHASING PROCEDURES

Invitation for Bids (IFB)
- Open End Contracts

Request for Proposals (RFP)
- Negotiation Process
REAL ESTATE

A. Unoccupied Space

B. Occupied Space
   10,000 square feet
   24 month commitment

C. American Disabilities Act
SOLE SOURCE

A. Competition does not exist.

B. Prior Authorization Form with supporting documentation as to why this vendor and only this vendor can provide the item/service needed.

C. Reported.
EMERGENCY

A. Threat to public health, welfare, safety, and/or property.

B. Call Purchasing.
   1. Phone bids may still be possible.

C. Reported.
LEGAL CONTRACT IS COMPRISED

1. Capacity
2. Legality
3. Consideration
4. Mutual Agreement
KSU CONTRACTS

A. Professional speakers
B. Consultants (Individual Contract, not employee)
C. Service Maintenance Agreements
D. Real Estate
SERVICES

Approvals & Waivers
Sales Tax
Insurance
Vehicles
Trademark Licensing
Audit
Governmental / Higher Ed Buyers
Vendor Information
SERVICES (cont.)

Purchasing Listserve
Purchasing Post
Website

Financial Services
Sponsored Projects
Accounting / Voucher Audit
Fund Balancing
Financial Reporting & Asset Management
Grant Issues

Excluded Parties List System
Disadvantaged Business Enterprises (DBE)
  Small Business
  Minority Business Enterprises
  Women Business Enterprises
American Made
Davis Bacon Act
DOLLAR LIMITS

$5,000 – Competitive Bids Required

$50,000 – Sealed Bids Required

$100,000 – Public Work Bonds Required
   (Construction)

$250,000 – KITO Approval for Software

$1,000,000 – Board of Regents Approval Required
RECAP

State Use Catalog
University Policy / Board of Regents
No Longer Required

State Contracts under $5000
Procurement & Contracts (formerly Div of Purchases)
Div of Printing, Topeka
Kansas Correctional Industries

Encumbering