
THE CATHOLIC UNIVERSITY OF AMERICA



Finance Orientation

October 20, 2009

PROCUREMENT SERVICES



Who We Are – Procurement Services

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Who We Are – Procurement Services

- ❖ Central procurement authority for all University purchases
- ❖ Manage the university business services contract agreements.
- ❖ Negotiate contracts for products & services that leverage the university's buying power
- ❖ University travel services program
- ❖ Procurement card program



Procurement Services

What you need to know before purchasing anything.

- Do you have enough budget?
- Do you have permission to buy?
- Delegation of procurement authority
- Agreement signatures
- Can you use a P-Card?
- Sales tax exemption
- Delivery dates
- Receiving your purchase!



Procurement Services

- ❖ **Procurement Card:** The preferred method of procurement under \$1000.
- ❖ **Requisition:** On-line in PeopleSoft Financial (14 step process found in Chapter#4 of the user manual)
- ❖ **Purchase order:** is a commercial document issued by the buyer to a seller, indicating the type, quantities and agreed prices for product or service. Sending a PO to a supplier constitutes and legal offer to buy.
- ❖ **Contracts:**
 - **Multi-Use - (preferred vendors such as Staples, Dell, Apple, etc)**
 - **Single-Use – (signed document w/term and conditions)**



Procurement Services – Contracts

❖ Authority to sign contracts:

- **President**
- **VP Finance & Administration** – Normal University Business Operations (w/ delegation to AVP Business Services)
- **Provost** – Faculty services, Sponsored Research/Training & Grants (w/ delegation to Assoc. Provost for Research)

❖ Business Services Management

- **Contracts Section on Web Site**

❖ OGC Review

- **OGC memo of 24May07**

❖ New Contract Routing Form

The Catholic University of America Contract Routing Form

INSTRUCTIONS: All University contracts, regardless of value, are to be routed through the Department of Procurement Services and Office of General Counsel for review and processing. This form standardizes that process and is to be used in the cover sheet to ensure the complete review by all appropriate campus offices. Ref: University Contract Policy at <http://www.cua.edu/finance/finance/contracts/contracts.htm> and University Procurement Policy at <http://www.cua.edu/finance/purchasing/Procurement/Procurement.pdf>

Date prepared: _____ Date Received _____ Requisition # _____

REQUESTING DEPARTMENT _____ **CONTRACTOR/VENDOR** _____
 Department: _____ Name: _____
 Contract Name: _____ Address: _____
 Phone #: _____

Description of item/service or University commitment required: _____

MANDATORY ROUTING:

Procurement Services Dept. / Date _____ **PO NUMBER:** _____
 Excluded Parties List (EPLS) Yes No
 Sole Source Requirements N/A Yes No
COST ESTIMATE: _____

2. _____ Approved _____ Disapproved _____
 General Counsel / Date

3. _____ Approved _____ Disapproved _____
 Director of Procurement Services / Date

4. _____ Approved _____ Disapproved _____
 Associate VP, Business Services / Date
 (over \$30,000 & service agreements)

5. _____ Approved _____ Disapproved _____
 VP, Finance and Administration / Date
 (over \$75,000 & term agreements)

SITUATIONAL ROUTING:

_____ Approved _____ Disapproved _____
 Budget Office / Date (Capital Funding)

_____ Approved _____ Disapproved _____
 Office of Risk Management / Date (Insurance/safety issues)

_____ Approved _____ Disapproved _____
 CPT / Date (IT hardware/services)

_____ Approved _____ Disapproved _____
 HR Office / Date (Temp Services)

_____ Approved _____ Disapproved _____
 Other / Date

INSTRUCTIONS

BASIC INFO

CONTRACT MGT AREA

REQUIRED ROUTING

OPTIONAL ROUTING



Procurement Services – The P-Card

- ❖ **Procurement card - Remember:**
 - Increased emphasis on Department Head/ Chair and Manager role
 - Monthly Statements- central oversight
 - Receipts – must accompany statements (cardholders maintain and submit monthly with statements)
 - Compliance – completeness/warning/suspend/ revoke
 - Audit- monthly spot audits
 - Training- initial 1hour classroom/annual on-line recertification



Procurement Services

The screenshot shows the website for Procurement Services at The Catholic University of America. The page is titled "Procurement Services" and is part of the "Vice President for Finance and Treasurer" section. It includes a navigation menu with categories like ABOUT CUA, ACADEMICS, ADMISSIONS, RESEARCH, CAMPUS LIFE, CATHOLIC IDENTITY, ATHLETICS, ALUMNI, and GIVE TO CUA. The main content area is divided into several sections: "Forms" (with dropdown menus for Controller, Payroll, Accounts Payable, Grants and Contracts, Budget, and Purchasing), "GENERAL INFORMATION" (providing contact details for Norman Brown, Manager, and Teresa Chandler, Administrative Assistant), "Hours of Operation" (Monday-Friday, 9:00 a.m. - 5:00 p.m.), "Some of the services we provide" (a list of procurement tasks), "Purchasing Procedures", and "Frequently Asked Questions about Purchasing".

- Authority limits
- Bids & Sole Source
- Travel Services
- Preferred Suppliers
- Training
- Website

