

**WASHBURN**  
UNIVERSITY



# Purchasing 101

*An Introduction to Procuring Goods & Services at Washburn*

<https://washburn.edu/faculty-staff/purchasing/index.html>

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## Purchasing Code of Ethics

**Individuals who procure materials and services for the University must have a highly developed sense of professional ethics to protect their own and their institution's reputation for fair dealing.**

- Give first consideration to Washburn University objectives and policies.
- Strive to obtain the maximum value for each dollar of expenditure.
- Decline personal gifts or gratuities.
- Grant all competitive suppliers equal consideration.
- Demand honesty in sales representation whether offered through the medium of a verbal or written statement, an advertisement, or a sample of the product.
- Receive consent of originator of proprietary ideas and designs before using them for competitive purchasing purposes.
- Cooperate with trade, industrial and professional associations, and with governmental and private agencies for the purposes of promoting and developing sound business methods.
- Foster fair, ethical and legal trade practices.

**NAEP**  
Code of Ethics

## Total Cost of Ownership (TCO)

involves considering *all* the costs associated with a product over its lifetime—from initial purchase price through its use, maintenance, and disposal.



## What is the added value in purchasing?

This pertains to all the cost savings that contribute monetarily to a organization's overall performance.

***This not only includes the "savings", or the cost reductions with respect to budgets or the prior period, it also includes cost avoidance, which the purchasing department aims for by buying goods or services from a supplier at a price lower than the market price or lower than the best offer price.***

# WUPPM Policies & Procedures on Procuring Goods & Services

## Advance Approval Requirement

Any purchase, contract, agreement or other obligation of **\$100,000 or more** MUST be approved by the Board of Regents before a purchase order or contract can be awarded.

## Competitive Bidding Requirement

Any purchase expected to be **\$10,000 or more** shall be competitively bid by the Purchasing Office. This requirement may be waived by the VPAT or VPAT designee when:

- 📌 There is an unforeseen and immediate need;
- 📌 There is an emergency need;
- 📌 There is only one known source for the purchase;
- 📌 The vendor's product or service has a current contract price with the State of Kansas; or,
- 📌 The price of product or service from the vendor was competitively bid by an educationally related organization of which the University is a member.

# WUPRPM Policies & Procedures on Procuring Goods & Services

## Additional Requirement

The VPAT or VPAT designee shall have authority to require competitive bids for purchases of less than \$10,000.

## Employee Restriction

Purchases by the University for Employees or other individuals for personal or private use are strictly prohibited. The University Amazon Business, StaplesAdvantage, Best Buy and other accounts cannot be used for personal purchases.

## Authorized Signatories

Only the President, Vice President of Administration/Treasurer, Director of Finance/Controller or the Director of Purchasing can sign contracts, proposals or other documents that commit University funds.



## Topics

- 👤 Purchase Goods & Services
- 👤 Competitive Bids – RFX
- 👤 Washburn Contracts
- 👤 Consortium & Cooperative Purchasing Agreements
- 👤 Amazon Business Account
- 👤 Technology Purchases
- 👤 Food & Beverage on Campus
- 👤 Washburn One Card
- 👤 Requisitions in Banner 9
- 👤 Vendor Registrations & W-9s
- 👤 Project Exemption Certifications (PEC)
- 👤 Washburn University Brand
- 👤 Purchasing Office Staff



# How to Purchase Goods & Services

Purchase by VISA One Card from US Bank:

Small purchases under \$750 except WU branded merchandise  
Monthly \$3500 spend limit can be adjusted to meet departmental needs

Submit Banner Requisition:



Under \$10,000 – submit quote to Purchasing Furniture, Services, Classroom & Lab Equipment, etc.

Over \$10,000 – Purchasing will issue competitive bid

## Types of Bids



**REQUEST FOR INFORMATION** – *solicits responses to explore how a vendor might solve a problem or fill a need.*

**REQUEST FOR QUOTE** – *vendors submit pricing for specified items or services.*

**REQUEST FOR PROPOSALS** – *also known as a negotiated procurement, vendors propose solutions and their costs.*

## Competitive Bidding for Purchases OVER \$10,000.00

1. A process of issuing a public bid with the intent that companies will put together their best proposal and compete for a specific project.
  - Request for Quote
  - Request for Proposals
2. It creates a transparent environment that is open and fair. Bids are posted on the WU Purchasing website.
3. Companies submit a sealed bid detailing the price and terms of an offer.
4. Bid openings are at 2:00 p.m. on the bid closing date.
5. The Purchasing Office and requesting department evaluate the bids to select the competitive bidder that has delivered the best overall value for the University.
6. A Purchase Order (PO) or Contract is awarded to the selected bidder.

*During the bidding process ONLY Purchasing Office personnel are allowed to communicate with vendors.*

## University Contracts

MANDATED contract vendors:

- Staples Advantage for Office Supplies\*
- Enterprise for Vehicle Rentals
- B&H Photo Video\*
- Century for Copiers/MFDs

\* **REQUEST ONLINE ACCOUNT FROM PURCHASING**

**STAPLES**  
Business Advantage



**BEST BUY**  
Business



## State Contracts



State of Kansas contracts can be found at [https://da.ks.gov/purch/contracts/purch\\_contract\\_search.aspx](https://da.ks.gov/purch/contracts/purch_contract_search.aspx). Only those with Contract Type 'Statewide Optional' are available for University use.

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# Copiers a.k.a. Multi Function Devices (MFDs)

- 📄 Savin MFDs can copy, scan, email & fax.
- 📄 Machines are available both in **black & white** and **color**.
- 📄 **COLOR MFDs ARE MORE COST EFFECTIVE THAN COLOR PRINTERS.**
- 📄 Toner replenishment is automatically handled electronically.
- 📄 Five (5) year rental agreement.
- 📄 Rental fee covers equipment and supplies.
- 📄 Paid annually at the start of the fiscal year.
- 📄 Overage charges, if any, are billed at the end of the fiscal year.
- 📄 Agreements can be modified if the number of copies per year needs to be changed.



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# Consortium and Cooperative Purchasing Agreements

Washburn University's membership in the groups below gives us access to contracts that were competitively bid. Please contact the Purchasing Office for assistance in accessing contract pricing.



**DON'T PAY RETAIL PRICES!**

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# Examples of Co-op/Consortium Vendors Available

*Not an Inclusive List – New Contracts are Added Monthly*

- 4Imprint for Clothing
- Air Filters, Inc.
- Auto Zone
- B&H Photo Video
- Bound Tree Medical
- Burmax Cosmetology
- Claridge
- Ecolab
- Fastenal
- Ferguson Plumbing
- Grainger
- Graybar Electric
- HD Supply White Cap
- Henry Schein Athletic
- Home Depot Pro
- KC Window Film
- Laerdal Medical
- Life Fitness
- McKesson Med-Surg
- Motion Industries
- Nasco
- O'Reilly Auto Parts
- Orkin
- Pocket Nurse
- PPG Architectural Finish
- School Health
- Wesco Distribution

***Contact Purchasing with questions, pricing requests or to get online ordering access.***

# University's Amazon Business Account



- University One Card must be used, NOT personal credit cards.
- ONLY for University purchases. Personal use is NOT allowed.
- Technology products are NOT allowed, always contact ITS for technology needs.
- All Amazon Business orders are reviewed by the Purchasing Office for conformance with University policies and procedures.



**PRICES on Amazon are not always less** – contact Purchasing to see if an item is available on a contract.  
**QUALITY is important** – check recent reviews & star ratings.  
**DELIVERY** – is free with \$25 order minimum – having to pay for delivery increases your cost.

# Technology Purchases

Washburn Information Technology Services (ITS) is **solely** responsible for most technology purchases for the University.

To acquire any of the following items please contact ITS at [support@washburn.edu](mailto:support@washburn.edu).

- 🖥️ Computers: PCs, Laptops and Tablets
- 🖥️ Computer Accessories especially for Apple products
- 🖥️ Software & Licensing



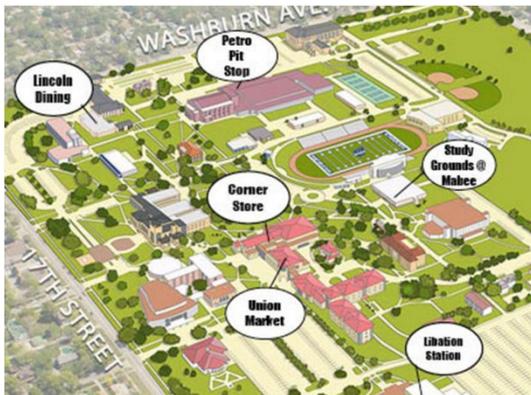
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# Food & Beverage on Campus



Chartwells is the **OFFICIAL** caterer on campus.

- Contact them at [catering@washburn.edu](mailto:catering@washburn.edu) or 785-670-2221 for menus, pricing and ordering.
- Do **NOT** use outside vendors for food and beverages unless you have Chartwells authorization first.



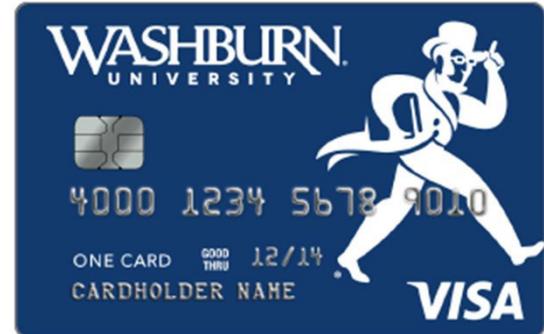
‘Courtesy Service’ items like snacks, soda, coffee, tea, water are **ONLY** allowed for students, prospective students & guests.

*Employees are to purchase their own beverages & snacks, etc.*

# Washburn One Card

The One Card is generally used to expedite the payment of high volume, small dollar goods and services for official University business and travel expenses.

- 👤 One Card Application - fill out and secure appropriate signatures.
- 👤 Responsibility - acquire goods/services at the lowest possible cost.
- 👤 Washburn University is tax exempt – inform vendors.
- 👤 Reporting – on time completion of transactions.
- 👤 Card Increase - send an email with cardholder request & supervisor approval for increase to [purchasing@washburn.edu](mailto:purchasing@washburn.edu).



**Transaction close date is the 25th of the month.**

**All transactions & supporting detail are due 6 business days after the close date**

*NONCOMPLIANCE WITH ONE CARD TRANSACTION REPORTING CAN RESULT IN CARD PRIVILEGES BEING REVOKED.*

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## Requisitions in Banner 9 - REQs

***A requisition is a request for purchase approval – it is NOT an order.***

A Requisition must be entered in Banner 9 for all procurements requiring a Purchase Order (PO). All requisitions go through an approval process in Banner that is based on dollar value and level of authority. Requisition Training is available at: <https://washburn.edu/faculty-staff/purchasing/training.html>

For REQs under \$10,000.00: Write the REQ # on the top of your vendor quote and email to [purchasing@washburn.edu](mailto:purchasing@washburn.edu). Use the 'DOC TEXT' option under 'RELATED ITEMS' to add the quote number, quote date and company rep name.

**Standard practice is to get three (3) quotes. Contact Purchasing any time you need assistance with Sourcing.**

## Vendor Registration & W-9s

- 📁 All vendors are required to have a current W-9 on file with the Purchasing Office.
- 📁 It is the Requestor's responsibility to have the vendor submit their W-9 either directly to [purchasing@washburn.edu](mailto:purchasing@washburn.edu) or to the requestor who can forward it.
- 📁 Purchasing Office enters all new vendors in Banner.
- 📁 Changes to vendor address, phone, etc. must be submitted to [purchasing@washburn.edu](mailto:purchasing@washburn.edu).
- 📁 Certificates of Insurance – COI – are **required** for any vendor performing work on campus.

# Project Exemption Certificates - PECs

- 📁 A PEC exempts the entire project – materials, supplies, equipment rental and labor services – from sales tax. Installation is a covered labor service.
- 📁 Kansas Department of Revenue issues PECs.
- 📁 Purchasing Office submits all requests for PECs.
- 📁 It is important to allow time for the PEC issuance process.

**Kansas Department of Revenue  
Sales and Use Tax Entity Exemption Certificate**

The Kansas Department of Revenue certifies this entity is exempt from paying Kansas sales and/or use taxes on items as stated below.

**Kansas Exemption Number:** <KS12345678>      **Expiration Date:** <MM/DD/YYYY>

The tax exempt entity understands and agrees that if the tangible personal property and/or services are used for any purpose that is not exempt from the tax, the tax exempt entity is liable for the state and local sales and/or use taxes on the full value of the certificate is expressly prohibited, punishable by law and/or imprisonment.

<Petitioning Authority>  
<Address Line 1>  
<Address Line 2>  
<City, State, Zip>



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**EXEMPT ENTITY INFORMATION:**

*Authorization and scope:*

- K.S.A. 79-3606(a) & (f) - Public or Private Elementary or Secondary Schools or Nonpublic Educational Institutions.
- Exemption applies to all direct purchases, rental or lease of tangible personal property and services, except purchases of goods for resale, installation and indirect purchases by a contractor for a real property project.

*Limits:*

- Only direct purchases are exempt through the use of this certificate.
- This certificate applies to exempt purchases by a contractor for the installation of a Project Exemption Certificate (PEC). PECs cannot be obtained over the internet prior to the start of the project. For more information at KDRR's web site: [www.kdr.com](http://www.kdr.com).
- This exemption does not apply to the purchase of services, services, machinery, equipment or tools used in the contracting, installing, repairing, installing, maintaining or replacing utilities, light, gas, electricity.
- Sales tax does not apply to purchases of building materials for residential construction and accessories to building materials for construction, remodeling or repair and furnishings such as beds, curtains, chairs and furniture. Labor services or materials are exempt in residential construction.

Exempt Entity Authorized Signature (Signature of the Manager or Administrator) \_\_\_\_\_ Federal ID Number \_\_\_\_\_  
Printed Name \_\_\_\_\_ Date \_\_\_\_\_

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**RETAILER INFORMATION:**

- To qualify for exemption, the certificate must have an expiration date in the future and be signed by an authorized individual.
- Payment must be made by the entity on their checking account or on a credit/debit card issued to the entity. Acceptance of cash, personal checks, or personal credit/debit cards is not allowed for a tax exempt purchase.
- The entity must have a Kansas exemption certificate. Exemption certificates issued by other states are not valid in Kansas.
- Retailers are required to maintain a copy of the purchaser's certificate in their records for at least 3 years from the date of purchase. Retailers must maintain a current certificate on file.
- Selling tax exempt goods or services that are not exempt by statute may result in the assessment of tax.
- A completed certificate may be used as a blanket exemption for future purchases when of the same type and for the same exempt purpose.

Seller's name and address \_\_\_\_\_  
Description of goods and/or services purchased \_\_\_\_\_

For additional information on Kansas sales and use taxes see Publication KS-550, Kansas Sales Tax and Use Tax; 100-700 and Publication KS-1520, Kansas Exemption Certificates, located at: [www.kdr.com](http://www.kdr.com). Questions should be directed to Taxpayer Assistance at 785-566-8222.  
KS-960  
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# Purchasing and Use of the Washburn University Brand

Items printed with any Washburn University branding **must** be purchased from a vendor that is licensed with CLC using a PO – Purchase Order, NOT with a One Card. Visit their website, <https://clc.com/license-search/>, and search for product type and Washburn to find licensed vendors.



## **Purchasing Services Staff**

- **Kathy Pflaum, Director of Purchasing** **785-670-2312**
- **Debi Feyh, Buyer** **785-670-2338**

**Our office location is Room 214 in Morgan Hall**

*Thank You for Your Time & Attention.*

