Purchasing Best Practices

Michelle Valine and Jim Hewlett
UC Davis
Supplier Showcase 2019
Good Purchasing Follows the 4 Cs!

- Correct
- Current
- Complete
- Consideration
Correct

- Is the correct document being used? Requisition versus Purchase Agreement

- Does the quote match what is entered on the document? (danger in referencing a quote when wanting to purchase only a partial order, changes in quantities; the importance of complete and understandable notes on documents)

- Is appropriate Commodity Code selected (buying a specific item, as opposed to purchasing service, maintenance, parts or a related item)

- Is labor priced at Prevailing Wage?
Current

- Are all attachments current?

- If a quote is attached, is it still within the validity period, or sufficiently remaining validity period to process an order?

- Has the service already been started or performed, or has the order already been placed with the vendor, shipped or arrived? This is considered an unauthorized purchase and will require a Confirming Order Justification as supporting Documentation.

- Will this order require the Supplier to have insurance, and is a current certificate on file in KFS?
Complete

- Is a complete description or scope of work provided?
- Is all required back up documentation included?
- Is a price quote included, or 2 quotes if the order is over $50K?
- An Independent Contractors Agreement/Form (if contracting with an individual or business that reports as an individual)?
- Conflict of Interest Form if required?
- Is the appropriate Ship to Address, Delivery Address or Address where the work will take place included?
- Have all the appropriate Approvals been obtained (e.g., Facilities, Safety Services)?
Consideration

- Please consider Procurement and Contracting Services standard turnaround time for correct and complete Requisition and Purchase Agreement submissions (not requiring formal bid) is 7-10 business days from buyer assignment.

- Please check the KFS route log and/or the notes section of the document before contacting the Team Lead or Buyer.

- Please familiarize yourself with available online resources and take advantage of available training opportunities.
Need Additional Help?

- How To Buy Guide: [https://supplychain.ucdavis.edu/procure-contract/how-to-buy](https://supplychain.ucdavis.edu/procure-contract/how-to-buy)

- General Purchasing Guidelines: [https://supplychain.ucdavis.edu/procure-contract/guidelines](https://supplychain.ucdavis.edu/procure-contract/guidelines)

- Procurement Help Desk
  - [procure-help@ucdavis.edu](mailto:procure-help@ucdavis.edu)

- AggieBuy Help Desk:
  - [ab-help@ucdavis.edu](mailto:ab-help@ucdavis.edu)
Thanks for your Participation!