



**UCDAVIS**

Supply Chain Management

# Purchasing Best Practices

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**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?



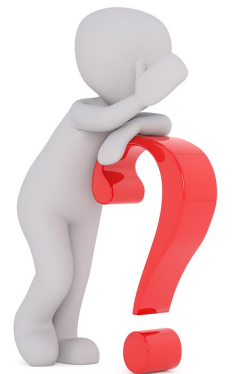
# Complete

- ▶ 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>
- ▶ General Purchasing 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!

