

Web-Based Goods and Services Procurement Guide

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Abstract

The University of Virginia's Procurement Services Department has oversight responsibility for all purchases made directly by departmental users. In an effort to help University staff understand and comply with the large number of rules that apply to the procurement process, Procurement Services created a web-based Goods and Services Procurement Guide. The Procurement Guide pulls information together from several different sources and presents it in a concise and easily searchable format. The Procurement Guide indicates which of five purchasing/payment methods may be used for more than 100 specific commodities. The Procurement Guide also notes when special restrictions, forms, or approvals apply to particular commodities and indicates when contracts and/or internal service providers are available for each type of commodity. The Procurement Guide has helped University staff do their jobs more quickly, efficiently, and accurately.

Introduction of the Organization

The University of Virginia, founded by Thomas Jefferson in 1819, is one of the best universities in the United States. *US News & World Report* has ranked the University of Virginia as the best public university for four of the seven years since they began ranking public universities. Among all colleges and universities, the University has always ranked within the top 25 in the nation. The University of Virginia is noted for the architectural beauty of the historic Rotunda and Lawn, the heart of the “academical village” designed by Thomas Jefferson, and for a tradition of academic excellence. Many of the University’s programs such as Law, Business, Medicine, Architecture, and English have ranked among the top ten in the country over the past decade or so. The 19,000 students attending the University work within a true meritocracy and live by an Honor Code unique among American universities. Each student is exposed to the widest spectrum of disciplines – from arts and athletics to humanities and technology.

Statement of the Problem

At the University of Virginia, the Procurement Services Department is responsible for all purchases and non-payroll payments made by the University. Under the purview of Procurement Services, individual departments enjoy a large measure of authority in the procurement process. This decentralized approach is more responsive to the needs of departmental users as well as being a more efficient and cost-effective way of doing business. The general problem with this division of labor, however, is in keeping the typical departmental user aware of all of the vast body of complex rules and regulations

that govern procurement. These rules come from many sources, including executive orders issued by the Governor's office, legislation passed by the General Assembly, regulations published by the Department of Accounts (DOA), the Department of General Services (DGS), the Department of Minority Business Enterprise (DMBE), and policies and procedures formulated by the University of Virginia's central administrative departments. The typical departmental user cannot realistically be expected to master such a large and complex body of information. The challenge for Procurement Services is to distill these rules and regulations and make them as accessible and understandable as possible to departmental users.

A specific difficulty that departmental users were encountering was in determining how to purchase or pay for specific commodities. The rules governing the purchase or payment for specific commodities were spread over several sources and were often ambiguous. Not surprisingly, departmental users were often frustrated at the time required to track down this information. Perhaps inevitably there were numerous instances of departmental users running afoul of state procurement rules and making purchases or payments that would later have to be cancelled or redone. The Procurement Services staff spent a great deal of time answering telephone and e-mail inquiries from departmental users over how to conduct seemingly simple transactions. Procurement Services was spending a large portion of its time dealing with these inquiries because the answers were often difficult to find. Procurement Services staff even realized, to their dismay, that they were occasionally giving inconsistent answers because the available sources were sometimes highly ambiguous and there are many instances where it wasn't clear which rule applied. The challenge for the Procurement Services Department was to

devise some solution that would help keep departmental users from violating state procurement rules while reducing the time its staff was spending in handling inquiries from departments on a case-by-case basis.

Design

The basic design of the Goods and Services Procurement Guide was devised by the Information Technology manager. The details and technical presentation were left to a member of the IT staff. The IT staff member made a list of more than 100 commonly purchased commodities and set about researching the state regulations and University policies and procedures that applied to each of these commodities. A draft of the Procurement Guide was completed within a few months and was intensively reviewed by a departmental committee consisting of buyers, Accounts Payable staff, IT staff, and managers. This committee met once a week for three to four months to sort out these questions one at a time. Departmental users were consulted and offered useful suggestions. Every effort was made to keep the presentation of the material as clear and concise as possible. The information was presented in a web matrix format (see illustration below) that allows users to search through an alphabetical list of commodities with five columns for each of the payment or purchase methods (University Purchasing Card, Limited Purchase Order, Direct Payment to a Vendor with a Payment Voucher, Reimbursement with a Payment Voucher, and Purchase Requisition/Purchase Order). Special restrictions or approvals are noted with each commodity, usually with a link to additional information. The Procurement Guide also indicates whenever a specific commodity can be obtained from a contracted vendor or from an internal supplier.

Goods & Services Procurement Guide - Microsoft Internet Explorer

Address: http://www.virginia.edu/procurement/departments/BuyPayGuide.html

Home >> Buying and Paying Basics >>

Goods & Services Procurement Guide

GOODS & SERVICES A B C D E E F G H I J K L M N O P Q R S T U V W X Y Z	METHOD OF PURCHASE/REIMBURSEMENT				
	Direct Purchase by Departments -- NOTE: No purchases which require a vendor-supplied contract may be made directly by departments -- all must be handled by Procurement Services.				Handled by Procurement Services Purchase Requisition / Purchase Order
	Purchasing Card (Up to Cardholder Dollar Limit)	Limited Purchase Order (Up to LPO Dollar Limit)	Payment Voucher		
	Direct Payment to Vendors	Reimbursement to Individuals			
Academic Testing Services and Accreditation Fees	Yes	Yes	Yes, if less than \$50,000	No	Discouraged if less than \$50,000, required if anticipated cost is \$50,000 or greater
Advertisements • University Contracts available	Yes	Yes	Yes	Yes	Yes
Airfare	-- See Travel Overnight: Air & Rail Tickets --				
Alcohol	No	No	Yes, if less than \$50,000 for purchases from ABC stores or distributors requires Dean or VP approval and must be made from local funds only	Purchase requires Dean or VP approval and must be made from local funds only See the Business Meal Certification form	Purchase requires Dean or VP approval and must be made from local funds only
Ammunition	No	No	No	No	Yes
Artists (not graphic designers)	Yes	Yes	Yes, if less than	No	Yes

-- Please [e-mail](#) us if you are unable to find a specific good or service on our list. --

(Note: The Procurement Guide can be found on the University of Virginia's Procurement Services website at <http://www.virginia.edu/procurement>)

Implementation

The Goods and Services Procurement Guide was published as part of the Procurement Services website. A rough estimate of the total time required to implement this project from start to finish is 300-350 hours which includes the time spent preparing the technical presentation of the material as a Web document, the research necessary to fill out the matrix, the time spent by Procurement Services staff in meetings, etc. Now that it is in place, the Procurement Guide is quickly and easily maintained and updated whenever necessary. Procurement Services has made an effort to publicize the availability of this

resource and users from around the University are encouraged to contact Procurement Services if they believe something should be added or clarified.

Benefits

The Goods and Services Procurement Guide has been enormously useful to all University staff with procurement responsibilities. It helps University employees do their jobs more quickly and with many fewer mistakes. The Procurement Guide has also cut way down on the number of telephone and e-mail inquiries the Procurement Services Department receives from users throughout the University. The Procurement Guide is an important tool in helping strengthen and sustain the University's system of decentralized procurement.

Retrospect

In retrospect, it would have been best if the Procurement Guide had been created sooner.