Purchasing Department Policies and Procedures
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I. **Purpose**

The Purchasing Department is responsible for the timely and efficient acquisition of goods and services to ensure that both the educational and business goals of the University are met, while maintaining the highest level of professional ethics and integrity.

Please direct all written correspondence to:

Saint Joseph’s University  
Purchasing Department  
5600 City Avenue  
Philadelphia, PA 19131

II. **Mission Statement**

As a department of the Office of Financial Affairs, the Purchasing Department will provide procurement expertise to assure the timely acquisition, and distribution of goods and services for the University community in accordance with policies and procedures established by the Saint Joseph's University Board of Trustees and the University’s management. We are committed to working with all departments of the University to identify, develop and implement procurement practices that will find the right products and services offered by our diverse business community to meet the support needs of the University.

III. **Code of Ethics**

The Purchasing Department is committed to the exercise of sound business judgment and maintenance of the highest ethical and moral standards in the conduct of university business and personal matters. The Department further subscribes to the professional code of ethics advocated by the National Association of Educational Procurement which is as follows:

1. Give first consideration to the objectives and policies of my institution.

2. Strive to obtain the maximum value for each dollar of expenditure.

3. Decline personal gifts or gratuities.

4. Grant all competitive Offerors equal consideration insofar as the established policies of my institution permit, and regard each transaction on its own merits.
5. Conduct business with potential and current suppliers in an atmosphere of mutual confidence and integrity, void of intentional misrepresentation.

6. Demand honesty in sales representation whether offered through the medium of a verbal or written statement, an advertisement, or a sample of the product.

7. Use only by consent original ideas and design devised by one vendor for competitive purchasing purposes.

8. Accord a prompt and courteous reception insofar as conditions permit to all who call on legitimate business missions.

9. Be willing to submit any major controversies to arbitration or other third party review, insofar as the established policies of my institution permit.

10. Cooperate with trade and industrial associations, governmental and private agencies engaged in the promotion and development of sound business methods.

11. Foster fair, ethical, and legal trade practices.

12. Counsel and cooperate with NAEP members and promote a spirit of unity among them.

With regard to matters that may involve a conflict of interest within a department, the University or within Purchasing, such matters should be brought to the immediate attention of the Purchasing Department, or the management of the Office of Financial Affairs.

IV. Chart of Accounts

The following account codes may be helpful in the preparation of doing business transactions

<table>
<thead>
<tr>
<th>BANNER ACCOUNT CODE</th>
<th>ACCOUNT NAME</th>
<th>ACCOUNT DEFINITION</th>
</tr>
</thead>
<tbody>
<tr>
<td>7051</td>
<td>Legal Fees</td>
<td>University's legal fees</td>
</tr>
<tr>
<td>7053</td>
<td>Accounting Fees</td>
<td>University's accounting fees</td>
</tr>
<tr>
<td>7055</td>
<td>Administrative/Faculty Search</td>
<td>Employee search for senior administration positions</td>
</tr>
<tr>
<td>7057</td>
<td>Insurance</td>
<td>Insurance premiums for University insurance policies</td>
</tr>
<tr>
<td>BANNER ACCOUNT CODE</td>
<td>ACCOUNT NAME</td>
<td>ACCOUNT DEFINITION</td>
</tr>
<tr>
<td>---------------------</td>
<td>------------------------------------</td>
<td>-----------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>7059</td>
<td>Misc Insurance Payments</td>
<td>Insurance payments for claims filed.</td>
</tr>
<tr>
<td>7061</td>
<td>Professional Services</td>
<td>Consultants, similar general university advisors, and services rendered. i.e. temporary staffing, security.</td>
</tr>
<tr>
<td>7062</td>
<td>Subcontractors</td>
<td>Compensation to another institution or vendor for work performed on grants and contracts only.</td>
</tr>
<tr>
<td>7067</td>
<td>License Fee</td>
<td>Misc license fees as required by the City, FAA, Fed Govt</td>
</tr>
<tr>
<td>7089</td>
<td>Indirect Costs</td>
<td>Indirect costs related to grants</td>
</tr>
<tr>
<td>7091</td>
<td>Department Share-Indirect Cost</td>
<td>Department share of indirect costs related to grants</td>
</tr>
<tr>
<td>7093</td>
<td>Contingencies</td>
<td>Budget only account code. Funds must be moved via a budget adjustment to expenditure line.</td>
</tr>
<tr>
<td>7095</td>
<td>Faculty/Professional Development</td>
<td>Funds used to defray expenses faculty incur for travel, conferences and publishing. Budget only-funds must be moved to appropriate line.</td>
</tr>
</tbody>
</table>

**GENERAL UNIVERSITY**

<table>
<thead>
<tr>
<th>BANNER ACCOUNT CODE</th>
<th>ACCOUNT NAME</th>
<th>ACCOUNT DEFINITION</th>
</tr>
</thead>
<tbody>
<tr>
<td>7101</td>
<td>Office Supplies</td>
<td>Office supplies</td>
</tr>
<tr>
<td>7103</td>
<td>Instructional Supplies</td>
<td>Classroom supplies</td>
</tr>
<tr>
<td>7105</td>
<td>Postage</td>
<td>US Postage, Overnight carrier, ground carrier fees</td>
</tr>
<tr>
<td>7107</td>
<td>Membership Dues</td>
<td>Dues to professional organizations</td>
</tr>
<tr>
<td>7109</td>
<td>Hospitality</td>
<td>Expenses for hosting university guests or extraordinary departmental functions i.e. gifts, flowers, museum tickets, gown rentals, etc.</td>
</tr>
<tr>
<td>7113</td>
<td>Photocopying</td>
<td>Interdepartmental and outside photocopying i.e. Kinko's, Staples</td>
</tr>
<tr>
<td>7114</td>
<td>Print Management</td>
<td>Printer maintenance and supplies</td>
</tr>
<tr>
<td>7115</td>
<td>Office Equipment Maintenance &amp; Repairs</td>
<td>Expenses to repair or maintain regular office equipment: fax, copier, computers, etc and maintenance contracts i.e. Copy Products, Imtek, Minolta</td>
</tr>
<tr>
<td>7117</td>
<td>Furniture and Equipment</td>
<td>Furniture or equipment less than 5000.00 per item</td>
</tr>
<tr>
<td>7119</td>
<td>Honorarums</td>
<td>Expenses paid for visiting lecturers</td>
</tr>
<tr>
<td>7121</td>
<td>Meals and Banquets</td>
<td>Dining expenses for individuals or groups i.e. Aramark, campus and local dining</td>
</tr>
<tr>
<td>7123</td>
<td>Awards and Prizes</td>
<td>Awards and Prizes for students</td>
</tr>
<tr>
<td>7125</td>
<td>Medical</td>
<td>Medical expenses incurred for Infirmary and Athletic dept</td>
</tr>
<tr>
<td>------</td>
<td>---------</td>
<td>---------------------------------------------------------</td>
</tr>
<tr>
<td>7127</td>
<td>Photography Expense</td>
<td>Expenses paid to a photographer and for developing</td>
</tr>
<tr>
<td>7129</td>
<td>Facility Rental</td>
<td>Rental of facilities within and outside the University i.e. Haub Center</td>
</tr>
<tr>
<td>7133</td>
<td>Productions</td>
<td>Cost of putting on events such as plays, concerts, musicals, art shows.</td>
</tr>
<tr>
<td>7137</td>
<td>Advertising and Publicity</td>
<td>General University and departmental advertising in/on newspapers, magazines, radio, TV, other.</td>
</tr>
<tr>
<td>7139</td>
<td>Board Approved-One Year Items</td>
<td>Board approved items for one fiscal year.</td>
</tr>
<tr>
<td>7143</td>
<td>Recreation Center Charges</td>
<td>Sports complex charges paid by ELS for student usage</td>
</tr>
<tr>
<td>7145</td>
<td>Operational Supplies</td>
<td>Supplies used by a department to help them perform the function of their office but not ordinary office supplies, i.e. University Press buys paper for printing, Security buys bike supplies.</td>
</tr>
<tr>
<td>7147</td>
<td>Site License</td>
<td>License that allows the University the right to run software or install copies of software on leased or owned computers and to extend these rights to University users (students, faculty and staff).</td>
</tr>
</tbody>
</table>

V. Purchasing Policies

- **Centralized Purchasing**

In order to maximize the financial benefits of centralized purchasing, purchases of all goods, contracted services, or leases of equipment in excess of $1000 should be made using the policies and procedures as set forth here. These purchasing procedures include the use of an electronic Purchase Requisition form submitted to the Purchasing Department, the use of an approved Purchasing Card, requisitions for purchases through vendor purchasing programs pre-established by Purchasing for regularly required products and supplies such as office supplies, or a vendor selection process developed and executed with the assistance of Purchasing, or in consultation with them.

- **Authority to Requisition**

Individuals responsible for academic or administrative departments who are assigned budgets are the only persons authorized to requisition supplies, contract services, and equipment against their budget. A department head may delegate authority, however, to an alternate in his or her absence. Notice of the alternate should be made to Purchasing by completing an **Authorization Signature Card**.
• **Purchase and Contract Review, Approval and Amendment Authority**

The University’s policies and procedures for the review, approval and signing of all contracts for the purchase of goods and services can be found on the website of the Office of the General Counsel at: [Contract Review, Approval and Signing Authority Policy](#).

Approval of the Vice President of Financial Affairs is required for all contracts of $200,000 or more. A Vice President or Provost approval is required for contracts of less than $200,000. The Vice President of Administrative Services has delegated authority to sign facilities management contracts. The Controller has delegated authority to sign contracts as approved and directed by the Vice President of Financial Affairs. The Director of Purchasing may sign for an amount up to $50,000.

• **Selection of Vendors**

Many situations require a joint determination by Purchasing and the user department in order to select the proper vendor. In any situation, vendor selection will be based on a determination of the best value for the University. Some of the factors used in evaluating value include:

- Price
- Bidder’s previous record of performance and service
- Ability of bidder to render satisfactory service in this instance (i.e., training, maintenance and repairs)
- Availability of bidder’s representative to call upon and consult with the end users
- Quality and conformance to specifications
- Delivery schedule
- Life expectancy
- Manufacturer/Dealer warranty
- Disposal value
- Demonstrated quality and reliability of proposed service
- Ability to provide features as required under bid specifications
- Ability to complete project within desired time line
- Completeness of bid
- Compatibility to support project with SJU practices
- Experience with project being proposed
- Trade references – preferable in high education environment
- Union vs. non-union
- Payment Terms
- Providing a Certificate of Insurance
- Ability to provide management reporting
- Acceptance of a letter of intent in advance of contract approval
- Acceptance of an SJU credit card for payment processing
- Financial stability of the bidders
- Minority/Women owned business
- Commitment to Sustainability
- Criminal background check
- Participation in Athletic sponsorship program
- Participation in other development programs in support of the University’s mission
- Corporate citizenship

**Competitive Bidding**

Good business practice and the responsible expenditure of University funds dictate that the University follows a policy of obtaining competitive bids/quotations. In so far as practicable, purchases shall be made on the basis of competitive prices, considering quality, suitability, delivery, and service. University policy requires acceptance of the best bid, prices and other factors considered.

The following minimum guidelines have been established to promote competitive bidding. Requisitioners should realize that these are minimum requirements and that bids should be solicited, whenever the item(s) can be purchased from several different, responsible vendors. Upon request, Purchasing will assist departments in locating potential vendors and obtaining pricing and product availability information.

**Not to Exceed $10,000 – No Quotes Required**

**Over $10,000 – Minimum 3 Written Quotes**

Purchases of goods or services in excess of $10,000 require a competitive three (3) bid procedure. Exceptions to the competitive bid requirement require submission of a Request for Waiver of Competitive Bidding Form to be signed by the responsible Divisional Vice President, Academic Dean, or Provost. Please view the [Request for Waiver form](#).

All requests for exception must be approved in writing by the Purchasing Director. In the absence of the Purchasing Director, all requests for exception must be approved in writing by the Associate Director of Purchasing. Allowable exceptions to the competitive bid requirement include:

- Bids from three sources are not commercially available
- Alternative providers cannot meet the required product or service specifications
- There is an immediate need for the purchase that does not allow time for bidding
- The University has a preexisting contract under which the good or service can be provided at a competitive cost.

Any request for bids for goods or services must be done in conjunction with the Office of Purchasing which will maintain records of bids received.
• **Buying Decisions**

Buying decisions will reflect the collective judgment of the user department and Purchasing, recognizing the accumulated knowledge and professional judgment of the Purchasing Department shall be a major factor in arriving at a buying decision to obtain the maximum value for the University. Any divergent views should be reconciled prior to approval of any contract or purchase order. To insure objectivity and eliminate unfair competitive advantage, vendor input in the development or drafting of specifications, requirements, request for quotes or request for proposals should be carefully considered and evaluated for appropriateness.

In documenting the process used for reaching a buying decision, Purchasing will seek to maintain a record of:

1. The vendors to which the invitation to bid was sent
2. The letter or email used for contract award and notification to the losing bidders
3. A Recommendation of Award (or equivalent) documenting the basis for the selection of the vendor, justification for lack of competition when competitive bids or offers are not obtained, and basis for award including cost considerations and other factors.
4. The evaluation team established to review requested bids. Such a team will ordinarily include representatives from the Purchasing Department and the business area(s) involved.
5. The criteria used for bid analysis and scoring of vendor proposals.

• **Purchasing Department Responsibilities**

The Purchasing Department will support the implementation of these policies in a number of ways, including:

- Maintenance of a sufficient list of responsible vendors to assure competitive bidding
- Providing a recommended procurement process for obtaining best value for the University and facilitating the conduct of the process
- Facilitating competitive bidding
- Maintenance of records of bids received
- Consideration of requests for exceptions to competitive bid requirements and
➢ Maintenance of records of approved exceptions

➢ Management of communications with bidders

➢ Providing department requisitioners all necessary information

➢ Handling of all department and vendor complaints and adjustments promptly and appropriately.

• Blanket Orders

Blanket orders, or standing purchase agreements, help departments take advantage of discounts, simplify repetitive ordering, and ensure timely shipments. Generally, they facilitate the order processing. In some cases, the size of the order may require requests for formal bidding before blanket orders can be prepared. Capital equipment purchases cannot be ordered under a blanket order.

A blanket order must have a maximum dollar limit and be reviewed prior to its expiration date or depletion of funds. The term of such standing purchase agreements should be limited to the extent practical recognizing limitations imposed by setup costs for the vendor and potential cost savings from longer-term contracts.

Open balances on blanket orders cannot be rolled over to a new fiscal year. The responsibility for maintaining accurate records of available balances for additional purchases rests with the departments, who, in turn, may seek assistance from the Budget group in the Office of Financial Affairs.

• Emergencies

During emergencies, obtaining purchasing approval may not be feasible, but follow-up review and authorization by the Purchasing Department should be sought after the fact and documentation maintained.

• Receiving Reports

Receipt of goods or contracted services is to be approved on the Receipt Acknowledgement copy of the Purchase Order when supplies are received or services completed. This form along with the signed invoice is to be returned to the Purchasing Office for review and processing. This function is to be performed by the department head or authorized alternate.

• Cash Terms and Discounts

Cash discounts are to be taken whenever available. The Purchasing Department will attempt to obtain maximum discounts whenever possible.
VI. Purchasing Procedures

The Requisition for purchases must be approved by the appropriate Budget Administrator or approved alternate and processed by the Purchasing Department. Requisitions should be clear, concise, and complete. Requisitions lacking sufficient clarity will be returned to the department submitting them.

- Preparing the Requisition
  
The electronic Requisition Form can be found under the Financial Information menu in My SJU. It is mandatory that departments submit their requisitions electronically. Training sessions are held on an as-needed basis and can be scheduled by contacting the Purchasing Department.

  Paper/manual requisition forms may only be used under special circumstances approved by the Purchasing Department.

  Electronic Requisitions cannot be processed unless there are sufficient funds in the appropriate budget.

- Telephone Ordering
  
  On occasion, the need for goods or services may arise that could not have been anticipated and following the normal ordering procedure could jeopardize a department's daily operation. In such cases, a telephone order may be issued only after an approved requisition has been received, reviewed and approved by the Purchasing Department.

- Pre-paid Purchases
  
  Pre-payments for purchases not exceeding $1000, (publications, booklets, etc.) may be requested using a Request for Funds form to be submitted to Financial Affairs with appropriate documentation. Pre-payments on purchases exceeding $1000 require a Requisition to be completed. The requisition along with the Request for Funds (for pre-payment amount) and invoice for pre-payment amount must be submitted to the Purchasing Department. Request for Funds forms can be found at: Request for Funds.

- Office Supplies
  
  Office Depot has been selected as the sole source provider of standard office supplies for the University. Orders can be processed by using the Office Depot Website. Orders may not exceed $1000 in value and limitations on the purchase of certain products may apply.

  If you are new to the University and need access to order through Office Depot, please contact the Purchasing Department to be set up.

- Service Agreements and Annual Contracts
  
  Each department should evaluate expiration dates of service agreements on its equipment. To renew service contracts, departments should submit a requisition to Purchasing a minimum of one month prior to the renewal date. DO NOT WAIT FOR VENDOR
INVOICES. If the renewal cost is unknown, assume the current price and the Purchasing Department will obtain valid pricing. Since service agreements are not always advisable, the Purchasing Department will assist in the evaluation of such agreements upon request.

VII. Travel Arrangements

Business travel must be coordinated and approved through our Travel Department by calling 610-660-1316. Travel policies and procedures can be found on the Travel Office website.

VIII. Printing

Printing, binding, and photocopying requests must be handled through Print Services. In the event that a specific project requires services not available through Print Services, the Production Manager of Print Services will make all necessary arrangements. Additional information on such services can be found by contacting Print Services.

IX. Computer Equipment Purchasing Procedures

Saint Joseph's University has authorized the Office of Information Technology to approve all computer-related equipment and software purchases made by the University. All items to be purchased must be consistent with University standards for networking and serviceability. It is Information Technology’s responsibility to ensure that all purchased items meet these requirements. To this end, the following procedures must be followed by all departments wishing to make computer-related purchases.

- When a department wishes to purchase computer equipment or software, it must first contact Information Technology for assistance in selecting items that meet the needs of the department and conform to the University’s standards. Information Technology will supply the department with a breakdown of the current cost of each item being sought.

- Information Technology will follow standard University purchasing procedures to acquire the equipment and/or software identified on the requisition. Information Technology will process the necessary paperwork to charge the department’s budget in accordance with the educational discount price of the equipment plus shipping and handling charges.

- When ordered items are received, Information Technology will schedule the installation of these items at locations designed by the departments at the earliest possible time.

- For additional information see Office of Information Technology Policies.

X. Purchasing Card Program

Overview
The Purchasing Card program is designed to facilitate the purchase of basic needs for the day to day operations of University departments by providing a quick and efficient mechanism to make recurring purchases. Please view Purchasing Card Program Policies and Procedures.

XI. Forms

The various forms that are available for downloading are given below. Just choose among them and click on them.

- Request for Funds Form
- Requisition to Purchasing Department
- Notice of Transfer of Equipment and Furnishing
- Surplus Material and Equipment Disposal Request
- Purchasing Card Application
- Request for Waiver of Competitive Bidding
- Authorization Signature Card

XII. How to Get What You Want When You Want It

THE PURCHASING PHILOSOPHY

What Requisition Authorization/Purchase Order Signatures Mean
What is a Suggested Vendor
When You Have Picked The Vendor
Competition for Business
Furniture and Furnishings
Lead Time
Emergencies
Complaints
There is No Such Thing As A Free Lunch
Other Problems

WHAT YOU CAN EXPECT FROM PURCHASING AND CONTRACTS

Fast Action
Follow-Up
Freight Claims
Negotiations
Product Information Gathering
Proposal Information
Cooperation

Some Dos, Some Don’ts And Some "Be Carefuls"

Dos
Don’ts
Be Carefuls

The Purchasing Philosophy

We are on the same team –Even though occasionally it seems that we are pulling in different directions, we are all here to do our part. Think of it like a football game, the ordering people are the backfield, while the people in Purchasing are the linemen trying to make your efforts a little easier. However, as with any game, there are rules to follow and we would hate to make a touchdown only to have it called back because of a rules infraction by one of the players.

The staff in Purchasing is on your team, too, and through better communication, hope to help you understand the rules of the game. In the process, we would also like to learn more about our teammates and their game plans. Remember, we don’t want to block our own players, so if we should do something that makes you think otherwise, let us know! We may not always agree with you, but we are certainly willing to help.

What Requisition Authorization/Purchase Order Signatures Mean

One of the things we signify when we sign your purchase order is that the transaction is the best we can make it for you. If something goes awry, we are held responsible!

In order to know that a given purchase is a good one, and to prove it when asked to do so, we occasionally have to ask questions about it. We may never question your right to buy what you need (provided you have the funds), but we will ask why the particular product you specify, or why the particular vendor you suggest, or why the particular price or deliver conditions.

Remember, when we sign your order, it becomes our order, and we must be able to defend it.

What is a Suggested Vendor?

We will assist you as necessary to prepare a requisition. There is a space in which to fill in your suggested vendor. Most of the time, we will not disagree with your suggestion, even though we check other sources to see if we can find a better deal. Sometimes, though, we will want to use a different supplier. There are various reasons for this: lower price, better quality, quicker delivery,
after the sale service capabilities, etc. The important thing to remember is that we do not change the vendor for the fun of it; we will not make a change we cannot justify; and we will not substitute material without your approval.

**When You Have Picked the Vendor**

We realize that many times the item you need automatically prescribes the source, but in other cases, we know that you have collected lots of information and devoted a significant amount of time to making your choice. One of the rules of our game is that we have to document our files so that the auditors can see that a proper job was done. For this reason, we ask that you share your backup material with us. (Of course, if you want to leave the source selection up to us, we will try to do a good job and we may be able to save you lots of time.)

**Competition for Business**

In general, price competition is the best way to make money go further. We advocate competition whenever practicable, and will really push it when we think it is appropriate. Competition is like any other tool; it must be used wisely, in the right place, and with the right skill.

We have had a lot of experience at this and can often help if given the opportunity.

**Furniture and Furnishings**

We probably know more about furniture and furnishings (or can find out faster) than almost anyone on campus. Good products still take a long time to get, so let us know your needs early and we will try to accomplish delivery when you want it.

**Lead Time**

In all likelihood, you cannot get delivery on the same day the order is placed. It is to everyone’s advantage that needs be made known to Purchasing as soon as possible. Bids, for example, require at least 15 days (often more) to process from start to finish, and then you must wait on delivery to be accomplished, which can vary from immediately to 30, 60 or 90 days. As you can see, there are times when it takes 3 or 4 months, or more, from the time you submit your requests. Try to be patient, we are following the rules and doing the best we know how. If there is an urgency or emergency, please be sure to make it known to us when submitting your request.

**Emergencies**

True emergencies do exist; however, in our dictionary, they are circumstances or situations beyond anyone’s control which affect the health, life, or safety of staff, students, or others, or could result in substantial financial loss or liability. We will pull out all the stops to help you with true emergencies! We will go out on a limb or cut any red tape possible to help you in the event a real emergency exists.
Complaints

We do not like to get complaints about the job we are doing...nobody does! But we also realize that complaints are often the only way we can analyze our problems and learn from them.

We feel that if we are doing something wrong or if a vendor has not performed well, we would like to be the first to know about it. We never ignore your complaints.

It helps to be specific – for instance, if you tell us we are taking too long to process your order, we hardly know where to start looking for the problem. But if you tell us we dropped the ball on P.O. 23456, we can tell from our records how long we have had it. If we just plain goofed, we will admit it. If the complaint suggests that there is something wrong with the system, we will take steps to correct it.

There is No Such Thing As A Free Lunch

Doing a good purchasing job requires the ability to make objective decisions. We are governed by professional ethics and policies against accepting gifts or favors which may result in a loss of our impartiality. Then when we have to make a difficult choice between two suppliers or crack down on an errant vendor, we can do it on the basis of what is right.

We also subscribe to the code of ethics promulgated by the National Association of Educational Buyers (NAEB) and the National Association of Purchasing Management (NAPM). These cover many aspects of our business conduct and include such matters as loyalty to our employers and fair treatment of suppliers.

In the end, we are trying to do our job as professionally, efficiently, and effectively as possible, just like you.

Other Problems

You (just like us) are going to have problems with certain vendors: delivery, pricing, slow processing, etc. There’s simply no way to avoid all problems, but we try hard. If you experience consistent inadequacies with certain orders or vendors, let us know about it. We will take steps to assist you with the current order and avoid future problems.

Let us know when you are talking with a vendor so that we can be aware of your plans and assist you.

WHAT YOU CAN EXPECT FROM PURCHASING AND CONTRACTS

Fast Action: We place most orders within 48 hours of receipt.

Follow-Up: Our resources do not allow us time to routinely follow-up on every order that is placed. We often follow-up purchase orders we think will need it. Feel free to request special follow-up though.
**Freight Claims:** We have had some experience in the wacky world of damage claims. If you have one, we want to know immediately in order to help within the time allowed.

**Negotiations:** If we know about your requirement in advance, we can contact the vendor and assist with pricing and delivery.

**Product Information Gathering:** We can help get specifications, catalogs, data sheets, etc., from suppliers.

**Proposal Information:** We can help get price and delivery information for your needs.

**Cooperation:** You can expect us to be cooperative. Occasionally, thought, we will appear reluctant to accept an item we are not sold on…especially if it seems contrary to proper business or competitive practices. Please do not interpret this as an uncooperative attitude. When we feel we simply cannot go along, we will, whenever possible, propose an alternate approach.

**SOME DOs, SOME DON’Ts AND SOME "BE CAREFULs"**

**DOs:**

**DO** ask for our help in plenty of time to allow us to do a quality job for you.

**DO** consult us far as in advance of a major procurement as you can. Give us a chance to give you some advice or offer help. We may be able to save you steps and money, or prevent later problems.

**DO** use the purchase requisition as you would a work sheet, providing as mush background information and giving any special procurement matters.

**DO** forward, concurrently with your purchase requisition, copies of any pertinent supporting or explanatory documents. Information about the source and price will help us, and often prevent processing delays and duplication of effort.

**DO** notify us immediately upon noting shortages or damage to received goods.

**DO** be specific when filling out purchase requisitions. Part numbers, exact sizes, units of measure, quantities, colors, etc., are important. If there is some question about what you want, talk it over with us.

**DO** be precise and detailed on your purchase requisitions, so that we know exactly what you want.

**DO** feel that you are an important part of the procurement process. Procurement is a "cooperative" venture at Saint Joseph’s.

**DON’Ts:**
DON'T disclose the details of a procurement to an unsuccessful bidder (this is called "debriefing"). This is often a ticklish matter and since we are charged with handling relations with losing bidders, we always try to handle the contacts in the most professional matter possible. If you are pressed by an unsuccessful bidder, we suggest you turn the matter over to us.

DON'T play one supplier against the other, disclosing one's price and inviting the other to beat it. This is called "bid shopping" and is considered unethical. Also, it only works once. It’s the best way we know to alienate good suppliers and destroy old and valuable sources and, in some instances, it is illegal.

DON'T wait until you are in trouble to contact us. Give us an early chance to get involved.

DON'T exceed your authority as delegated to you within the Purchasing policies and procedures of the University.

DON'T accept demonstration equipment from vendors without advising us. We help protect you from later problems (e.g., warranties, damages) if we know in advance.

DON'T give any vendor an order without first obtaining a purchase order from the Purchasing Department. This policy applies to orders exceeding $1000 when a requisition is required.

DON'T sign any contracts or agreements. This can result in major liability and responsibility for Saint Joseph’s. Leave the review and signing of contracts to those who are experts in this field and familiar with the legal ramifications. Remember – all contracts are subject to the Contract, Review, Approval and Signing Authority Policy set forth on the website of the Office of the General Counsel.

BE CAREFULs:

BE CAREFUL about going out on a limb without contacting Purchasing. If you are negotiating specifications, price, or delivery with a supplier, you probably should have already touched base with us. It may need to go out for a formal competitive bid and prior discussions with vendors to assist in the bid process are inappropriate.

BE CAREFUL when writing specifications, and be even more careful when reviewing specifications which have been written by the supplier. There are different kinds of specifications, and they drastically affect the procurement risk and competition. Whenever you want to buy a non-off-the-shelf item, contact us early.

BE CAREFUL about referencing a vendor’s proposal on your requisition because it seems easier than writing the whole description out. Vendor’s proposals almost always contain terms and conditions which conflict with ours and naturally, they always favor the vendor.