

# Procurement 101

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## Requirements & Resources



# Overview

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## Procurement 101 Topics

- What is Procurement?
- Why is Procurement important?
- Policies and Procedures
- Hierarchy of University Procurement Requirements
- Quote & Bid Threshold Policy
- Additional Resources

# What is Procurement?

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## Procurement

All functions that pertain to purchasing, renting, leasing, or otherwise obtaining any supplies, services, or goods which includes a description of requirements, the solicitation of sources, selection, preparation, and award of a contract.

## Procurement Services

Office, division, or unit with the *authority* for acquiring all goods, services, or construction for the entity.

## Procurement Agents

Trained professionals that often hold special certifications and the unique *authority* to manage the procurement of goods and services in accordance with all federal, state, and local requirements.

# Why is Procurement important?

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## Value

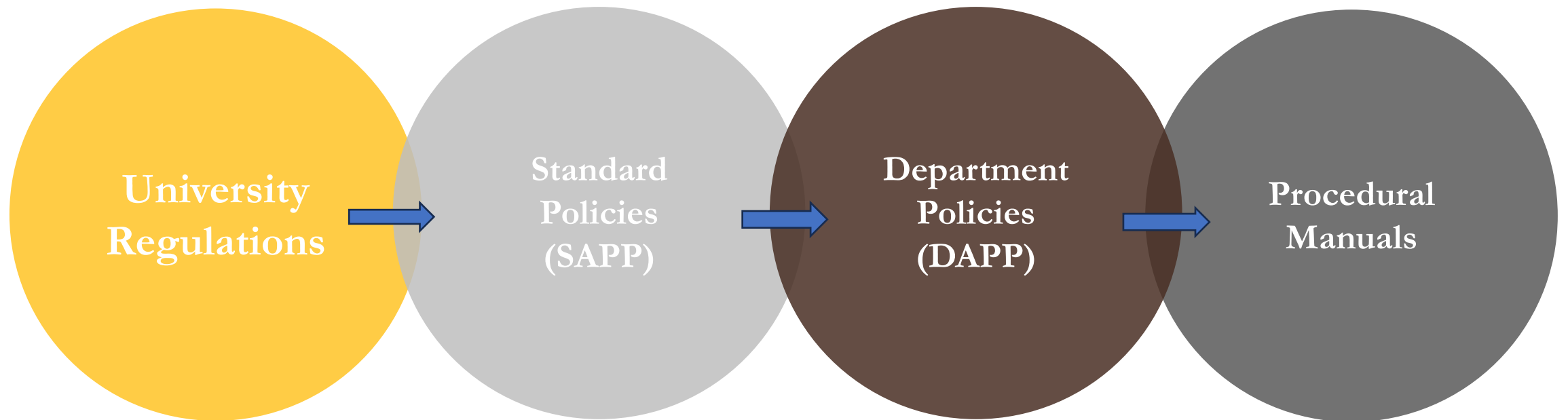
Procurement processes are designed to create value through open, fair, and transparent competition amongst suppliers when using university held funds.

## Compliance

Procurement processes ensure that all university expenditures are made in accordance with the university [Quote & Bid Threshold Policy](#) and all other university, state, and federal requirements.

Compliance with all federal, state, local, and university requirements protect the university and employees from personal liabilities and other violations which may jeopardize future funding opportunities.

# Hierarchy of Procurement Requirements



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**University  
Regulations**

## [7-8 Gifts and Celebratory Events for Employees](#)

Outlines requirements to purchase gifts and/or host celebratory events for employees

## [7-9 Standard Administrative Policies and Procedures](#)

Requires the *Division of Budget and Finance* to establish Standard and Departmental Policies and Procedures

# Hierarchy of Procurement Requirements

**Standard  
Administrative  
Policies &  
Procedures  
(SAPP)**

## [Quote & Bid Threshold Policy](#)

Provides various thresholds and requirements based on dollar amount of purchase

## [University Travel Policy](#)

Describes allowable travel expenses and reimbursements for both employees and non-employees

## [Honorariums, Stipends, and Participant Costs](#)

Details for honorarium and incentives limits and how to process them

# Hierarchy of Procurement Requirements

Department  
Administrative  
Policies &  
Procedures  
(DAPP)

## [Approvals for Finance Transactions](#)

Describes the various approvals and processes required for different types of financial transactions

## [Cash Advance and Cash Vouchers](#)

Provides allowable uses and the process to request a Cash Advance



# Hierarchy of Procurement Requirements



Procedures  
&  
Manuals

## [Procurement Services Manual](#)

Details Allowable/Unallowable purchases and who has authority to make purchases

## [Procurement Card Manual](#)

Guidance on proper use of university P-Card

# Quote & Bid Threshold Policy

- Most important procurement policy
- Incorporates all Federal, State, and University requirements
- Details how all purchases must be made regardless of funding source
- Based on dollar thresholds and the purchase amount (purchases may not be split to circumvent threshold limits)

# Overview

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## Quote & Bid Threshold

### **Micro-Purchase Thresholds (MPT)**

- \$0 - \$9,999

### **Simplified Acquisition Threshold (SAT)**

- \$10,000 - \$99,999

### **Sealed Bid & Competitive Proposal Threshold**

- \$100,000 +

### **Non-Competitive Procurement**

- Exemptions and Sole Source

# Micro-Purchase Threshold (MPT)

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Discretionary: \$0 - \$4,999

## Supplier Selection

- minimum of **one** documented quote

## Contract

- if required by [Office of General Counsel](#)

## Purchase Request

- [Requisition](#)
- [Non-PO Invoice](#) (if allowable)
- P-Card

# Micro-Purchase Threshold (MPT)

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With approval: \$5,000 - \$9,999

## Supplier Selection

- minimum of **one** documented quote

## Contract

- if required by [Office of General Counsel](#)

## Purchase Request

- [Requisition](#) A university *Purchase Order* must be issued before goods and services are provided.
- [Non-PO Invoice](#) (if allowable)
- P-Card (with prior approval)

# Simplified Acquisition Threshold (SAT)

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\$10,000 - \$99,999

## Supplier Selection

- minimum of **two** documented quotes *or* an approved [Sole Source](#)

## Contract

- if required by [Office of General Counsel](#)

## Purchase Request

- [Requisition](#) A university *Purchase Order* must be issued before goods and services are provided.
- [Non-PO Invoice](#) (if allowable)
- P-Card (with prior approval)

# Sealed Bids & Competitive Proposals

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\$100,000 + requires Sealed Bids (IFB)  
& Competitive Proposals (RFP)

## Supplier Selection

Request for Proposal (RFP) or Invitation to Bid (IFB) conducted by Procurement Services, *or* an approved [Sole Source](#)

## Contract

- as required by [Office of General Counsel](#)

## Purchase Request

- [Requisition](#) A university *Purchase Order* must be issued before goods and services are provided.
- [Non-PO Invoice](#) (if allowable)

# Non-Competitive Acquisitions

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Allowable under limited circumstances

- Only available from a single source as approved via [Sole Source Request Form](#)
- Category Exceptions as listed in [Quote & Bid Threshold Policy](#) (Section III-E)
- After soliciting from multiple sources, competition is deemed inadequate
- Public Emergency: “action to save lives or protect property, public health and safety” ([FEMA](#))



# Procurement Support Resources



## Additional Resources

### [Guidance on Obtaining Quotes](#)

Best practices when soliciting quotes from suppliers for goods and services

### [Procuring Goods and Services Guide](#)

How to purchase goods and services in compliance with all university requirements

### [Know before you Go - Traveling with a P-Card](#)

Do's, Don'ts, FAQ's, and other helpful information to make the most out of traveling with your UW P-Card

# Procurement Support Resources



**Individual and Group Training is available!**

Simply call, email, stop by our office, or visit the [Procurement and Payment Services](#) website and click **“Make an Appointment”**

**Need Procurement assistance? Schedule a meeting here:**





# Questions?

# Thank you!

## Contact us:

**Procurement & Payment Services**

Phone: 307-766-5233

**Procurement Services** email: [procurement@uwyo.edu](mailto:procurement@uwyo.edu)

**Payment Services** email: [accounts-payable@uwyo.edu](mailto:accounts-payable@uwyo.edu)

**P-Card** email: [pcard@uwyo.edu](mailto:pcard@uwyo.edu)