



Purcha\$ing \$en\$e

A Quarterly Publication from the OU Purchasing Department

www.ou.edu/purchasing/home/index.htm

Did you know?

The University of Oklahoma has established a comprehensive diabetes center with operations on the OU campuses in Oklahoma City and Tulsa to provide statewide leadership in diabetes treatment, research, prevention, information, education and awareness. The Harold Hamm Oklahoma Diabetes Center provides access to the latest developments in diabetes care and management through the clinical trials hosted by the center.

-Source,
OU Public Affairs

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Be a ★! With Energy Star

You don't have to be a tree hugger, polar bear lover, or global warming fanatic to be a fan of sustainability. If you're in favor of clean air, wise spending, and the conservation of resources, then you're as normal as can be, no matter if you're republican, democrat, or independent. That's why you'll be pleased with the University's Energy Star Policy for purchasing efficient and economical appliances. It's posted on Purchasing's website (<http://www.ou.edu/purchasing/home/>), but it's repeated below for your convenience.

Introduction: In support of its commitment to economy and sustainability, the University of Oklahoma promotes the usage of appliances and equipment that minimize energy consumption and that do not present hazard to health or property.

Principal Intent: Although exceptions may be indicated on a case-by-case basis (e.g., the Energy Star designation may not exist for a particular class of appliance or equipment), this policy covers the acquisition of appliances and equipment for use on University property or for University purposes (Acquisitions). It is the intent that this policy applies irrespective of source of funds. Requests for exceptions should be made to the University's Purchasing Department.

Policy: Acquisitions shall be limited to those appliances and equipment that bear the Energy Star designation of the Environmental Protection Agency. Information about Energy Star products can be accessed at the Energy Star website:

<http://www.energystar.gov>.

For Acquisitions made under the University's Small Dollar provision, the Purchasing Department is available for assistance with selecting Energy Star-rated appliances. For Acquisitions above the Small Dollar provisions, the Purchasing Department must be consulted for competition. Solicitations shall include terms and conditions for industry-approved certifications and the Energy Star designation, when feasible.

And, it's helpful to know that Energy Star appliances aren't only meant to be used in work places. They work at home, as well. So, the next time you're in the market for a new appliance, think ★!... Energy Star.



E&I



The University of Oklahoma is a member of the Educational & Institutional Cooperative, Inc. (E&I). E&I is a higher education buying consortium that contracts with several vendors for a variety of products and services and then offers these contracts to their members to use. These contracts have all met the bidding requirements and terms and conditions required by our University. Therefore, when ordering from these vendors bidding is NOT required. Here is a short list of some of the vendors on contract. You can obtain a complete list or ask any questions about these contracts by contacting any buyer in Purchasing.

- Agilent Technologies**—Life Sciences Products & Services
- Air Gas, Inc**—Lab Gas Cylinders/Compressed Gases/Equipment
- Allied Van Lines**—Moving and relocation services
- American Express**—Procurement Card
- Beckman Coulter**—Centrifuges
- Federal Express**— Transportation and Freight
- Hewlett Packard**—Computers & Networking
- Office Max**—Office Equipment and Supplies
- SKC Communications Products, Inc**—Multimedia/Video Conf.
- VWR**—Scientific Equipment

2010 Regent’s Meeting Dates

The following Board of Regents meeting dates are provided to assist you in your planning for any purchase over \$250,000. Purchase orders over this amount cannot be issued until approved by the Board of Regents of the University of Oklahoma. Please contact Purchasing as soon as possible for assistance to plan and allow adequate time to purchase goods or services requiring Regents approval. You will need to allow sufficient time for the bid process - in most cases this is a minimum of three weeks **prior** to the ‘Due to Purchasing’ date. For construction projects, a minimum of 6-8 weeks is required prior to the “Due to Purchasing” date. Please note the following columns. The first is the posted Regents meeting date. The second is the deadline to submit your **required information** to Purchasing for an agenda item. Your agenda item will be one of many written for HSC, Norman and Tulsa campuses so the lead time is very important. Required information to Purchasing includes bid results with completed matrix or approved sole source justifications, source of

funding, etc. The third is the deadline for Purchasing to submit the completed agenda item to Administration and Finance.

<u>Regent’s Meeting Dates—2010</u>	<u>Due to Purchasing</u>	<u>Due to Administration and Finance</u>
January 27-28	December 1	December 14
March 24-25	February 5	February 15
May 13-14	March 23	April 1
June 21-23	April 26	May 10
September 13-14	July 26	August 2
October 27-28	September 2	September 13
November 30—December 1	October 8	October 18

The dates for submission to Purchasing and Administration and Finance are estimates and subject to change. Please contact Purchasing to confirm correct deadlines to ensure an adequate timeframe for your entire solicitation, evaluation and approval process. Purchasing’s main phone number is (405) 325-2811.



Import / Export Processing

All shipments entering and exiting the United States require customs clearance. The United States Customs and Border Protection (CBP) is charged with regulating and facilitating international trade, collecting import duties, and enforcing U.S. regulations, including trade, drug and immigration laws. DB Schenker, the University's customs broker, deals with US Customs and all other government agencies on behalf of the University of Oklahoma to obtain the fastest possible clearance into the United States in accordance with stipulated rules and regulations. They will classify any products you are importing / exporting and will provide total amount of US Customs duties that are found due in order for customs to clear and deliver shipment to its final destination.

Please consider this fact from the U.S. Customs and Border Protection agency the next time you handle customs issues yourself: that for every product imported / exported there are pages of customs regulations and tariff items that need to be considered.

Contact Purchasing for Broker information and account number for your next Import Export transaction.

Green Holiday Parties

Planning a party this holiday season? Green it up with these tips.

Invites: Save money and resources by sending invites via email or text message.

Decorations: Skip the paper and plastic and decorate with natural items from your yard-evergreens, pinecones, or seasonal houseplants.

Party supplies: Use reusable dishes, utensils and cloth napkins. Rent or borrow items you won't need more than once, like large punch bowls and chafing dishes.

Food: Avoid waste by thinking conservatively when planning the quantity of food.

Trash: Recycle as many items as possible.



Pcard Departmental Reviews

The Pcard Team is in the process of finalizing this year's departmental reviews for the HSC campus and will soon be moving onto Norman. A Pcard review is simply a meeting between the department, or certain individuals in the department, and the Pcard Team to look over your department's Pcard transactions and document your processes. We only need to meet with an individual who could retrieve Pcard records and answer questions about purchases and processes, but any and all employees involved with the Pcard are welcome to attend. We will send out emails proposing a meeting date and time. Please let us know if the arrangements are convenient for your department and we will setup the meeting.

Regents Agenda Item Information Request Form

The Purchasing Department is primarily responsible for writing and submitting Regents agenda items to Administration and Finance for purchases that exceed \$250,000 that require Regents approval. There are very tight deadlines to submit these agendas and it is important that University departments complete a Regents Agenda Item Information Request Form with detailed information regarding the purchase requested. This form will be forwarded by the assigned buyer to the department when the expected dollar amount of the purchase request will exceed \$250,000. The information from this form will be used to draft the agenda for your department and has specified questions that the department must complete, most importantly the

background / rationale section. This section must be detailed and provide the justification for the purchase request. It should explain why it is important to make this purchase, what the value is to the University, and the benefit to your department or college. You are stating why it is important to receive approval for your purchase. If all the information is not yet available due to a bid or RFP, the background/rationale and all available information must still be provided to begin writing the agenda item. If you have any questions regarding the Regents Agenda Item Information Request Form, please contact the Purchasing main number and request any manager or the assigned buyer.



Pcard Training Reminder

While cardholders are only required to attend training before they obtain their Pcard, this doesn't mean they aren't eligible to come back to training. Many cardholders attend training not knowing much about the Pcard program or what they will be buying with their Pcard. Some cardholders have not attended a training session since 2006 and while not much has changed about the program during that timeframe, it never hurts to refresh your knowledge or learn about other types of purchases eligible for Pcard payment. If you would like to attend another training session, please sign up using the links listed to the right.

The Pcard Team normally has at least one training session on each campus each month.

HSC - https://webapps.ou.edu/Purchasing/pcard/training/forms/hsc/hsc_form.cfm

Norman - https://webapps.ou.edu/Purchasing/pcard/training/forms/norman/norman_form.cfm

Tulsa - https://webapps.ou.edu/Purchasing/pcard/training/forms/tulsa/tulsa_form.cfm



Pcard Cutoff Dates for 2010

The cutoff dates for 2010 have been posted. Since no reminders are sent out, it is a good idea to create a reminder for yourself each month in order to avoid missing cutoff dates. Different forms of reminders may include creating a calendar event in Outlook, printing out the cutoff dates and posting them at your desk, or writing the cutoff dates in your calendar.

The 2010 cutoff dates are linked below so you can start creating your reminders now!

HSC - http://www.ou.edu/purchasing/home/pcard/cutoff_dates2/2010%20Cutoff%20Dates-HSC.pdf

Norman - http://www.ou.edu/purchasing/home/pcard/cutoff_dates2/2010%20Cutoff%20Dates-Norman.pdf



Pcard Tips

Applications. If you would like to apply for a Pcard but are not sure how, there are step by step instructions located on the Purchasing Website. The instructional document can be found under the "Pcard Program" tab on the left. Click on the tab titled "Instructional Material" and you will find the "NetApps-Cardholder" and "NetApps-Approver" instructional pages (http://www.ou.edu/purchasing/home/pcard/instruction_materials/NetApps_Cardholder.pdf). Please note that there are separate instructions for cardholders and approvers. Of course if you have any questions about applying for a Pcard you can always contact the Pcard team at proadmin@ouhsc.edu.

Conference Registrations. Having the appropriate amount of documentation is important for reconciling Pcard purchases and for auditing purposes. For the prepayment of conference registrations please make sure you keep a copy of the following information from the conference host with your Pcard records. This information should be obtained before any type of payment is made. This information can usually be obtained by locating it on the conference host's brochure or website and printing to put with your Pcard records. If you cannot find the information on the host's brochure or website try emailing the conference host asking the following questions:

I. Conference host will not, as a standard practice of business, accept a Purchase Order.

OR, if the Conference Host does accept a PO then all of the following three criteria must be in place:

I. Conference host will apply a discount for early registration to the conference.

II. Conference host will allow for substitution of participants.

III. Conference host will refund 100% of the registration cost if the conference is cancelled.

If paying for the registration at the time of the event or after the event has occurred, then only a receipt or invoice is required.

Personal charges such as CME credits, additional meals, memberships, banquets, golf tournaments, etc. must be paid for separately and not on the Pcard.

**Serving the Norman,
Oklahoma City and Tulsa Campuses**

University of Oklahoma
Purchasing Department
2750 Venture Drive
Norman, Oklahoma 73069
Phone: (405) 325-2811

Norman Campus
OU Property Control Surplus Store
Now open for general public sales each Wednesday
from 8:30 AM—2:00 PM
2101 West Tecumseh Road, Norman
Call (405) 325-2782 or visit
http://www.ou.edu/property_control/index.htm
for more information.

Meet Craig Sisco



Craig Sisco began working at the OU Purchasing department in 2003 as a buyer. Earlier this year he was promoted to manager of the Facilities Team. You may be familiar with Craig as he works on widely used university contracts such as Office Max, FedEx and Sam's Club. Craig has a passion for purchasing and went through the grueling testing process to earn his Certified Procurement Officer (CPO) title in 2008. Craig says that what he likes most about his job are the challenges Purchasing can provide. He says, "This job provides satisfaction that I am able to help and teach departments the proper purchasing procedures and assist them whenever they need me." When he's not working, Craig spends his time golfing and watching OU football. He also enjoys spending time with his wife, two daughters and stepson.



Best wishes to Tami Tatum who is transferring to another state agency.

Purcha\$ing \$en\$e is a quarterly publication of the University of Oklahoma Purchasing Department.

Jean Wilson, Associate Director of Purchasing

Give Us A Call!



Acquisitions

Nathan Baird 325-5083
Pam Cantrell 325-9606
Kent Depe 325-2818
Linda Johnson 325-2229
Mark Keesee 325-8519
Brad Larson 325-8965
Susan Mecham 325-3091
Lisa Merrell 325-4893
Ron Nealis (918) 660-3079
Michael Parrish 325-9846
Randy Payton (918) 660-3082
Kira Reyes (918) 660-3091
Linda Royal 325-7079
Sean Simpson 325-3308
Craig Sisco 325-5261
Sandy Totten 325-5090

Pcard

Brittani Browning 325-4637
Suzanne Carter 325-5092
Emily Pierce 325-9485
Rebecca Selby 325-5081

Property Control

Patty Bowman 325-2641
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Stephen Kraus 325-2782
Jeremy Paden 325-2701
David Seymour 325-2782
Dennis Winfrey 325-1680