Approval & Buying Guide

Required Approval Process and Buying Method For Service, Commodity & Expenditure Types

The University of San Francisco sets procurement and expenditure guidelines with the objective to promote fiscal responsibility, risk mitigation, as well as protect the health and safety of our community and facilities.

For your reference Purchasing and Ancillary Services compiled a list of service, commodity and expenditure types which outlines the required approval process and approved buying method. The list is not all-inclusive and is subject to change.

Please note a special approval to purchase a good or service does not exempt the transaction from the remainder of the procurement process, including budgetary approvals and competitive bid thresholds.

Purchasing & Ancillary Services is here to assist departments through this process. Please contact us at (415) 422-5898 or purchasing@usfca.edu

CONSULTING

SERVICE, COMMODITY, EXPENDITURE	REQUIRED APPROVAL PROCESS	APPROVED BUYING METHOD
IT Services: consulting, 3rd party services, data/port	Please contact ITS prior to contracting work. Services may be available in--house, through use of a preferred vendor, and/or may require CIO approval prior to work. Note that all vendor/contractors performing work on campus must submit a current Certificate of Insurance to Risk Management prior to start of work.	University Contract Purchase Order

EQUIPMENT

SERVICE, COMMODITY, EXPENDITURE	REQUIRED APPROVAL PROCESS	APPROVED BUYING METHOD
Appliances & equipment - that utilize over 1 amp: i.e. refrigerator, microwave, stove, oven	Facilities Management must review electrical loads and approve all requests that would add amperage to a circuit. Submit a Work Request Form with Facilities Management via AIM online system or call the Front Desk at (415) 422-6464. NOTE: Any facility modifications (i.e. add outlets, circuit) will be the financial responsibility of the requesting department.	Purchase Order
Capital Equipment - acquisition amount is over $5K, has the useful life of over 1 year, not disposable/consumable	All requests utilizing capital funds requires the signature of ASP for Facilities Management or University Controller.	Purchase Order
Equipment -- requiring Facilities support and/or heavy or industrial	Products that have special requirements for handling, setup, usage and/or storage must be reviewed and approved by Facilities Management prior to submitting a Purchase Requisition. Submit a Work Request Form with Facilities Management via AIM online system or call the Front Desk at (415) 422-6464.	Purchase Order

FACILITIES AND MAINTENANCE

SERVICE, COMMODITY, EXPENDITURE	REQUIRED APPROVAL PROCESS	APPROVED BUYING METHOD
Flooring -- tile, carpet (excludes small area rugs)	Submit a Work Request Form with Facilities Management via AIM online system or call the Front Desk at (415) 422--6464.	University Contract
HVAC - heater, ventilation equipment, air conditioner (window or portable): including fans	Facilities Management must review and approve all requests dealing with HVAC, including stand alone units. Submit a Work Request Form with Facilities Management via AIM online system or call the Front Desk at (415) 422-6464.	Purchase Order
Repairs, building service/maintenance, and/or any work relating to building conditions (interiors and exterior)	Due to established maintenance agreements and USF union labor agreement, Facilities Management manages all facility--related maintenance agreement and contracts, including corresponding requirements such as valid certificates of insurance per service provider. Repairs and upkeep may be available in--house, through use of a preferred vendor, and/or may require ASP of Facilities Management approval prior to commencement of work. Submit a Work Request Form with Facilities Management via AIM online system or call the Front Desk at (415) 422--6464. .	University Contract Purchase Order

FURNITURE, FIXTURES AND EQUIPMENT (FFE)

SERVICE, COMMODITY, EXPENDITURE	REQUIRED APPROVAL PROCESS	APPROVED BUYING METHOD
Fixtures: a piece of equipment or furniture that is fixed in position in a building (i.e. fixed kitchen appliance, wall--mounted shelving, lamps/lighting unit)	Due to facility codes, regulatory issues, and USF's labor union agreement, purchase and installation of fixtures must be reviewed and approved by Facilities Management prior to submitting a Purchase Requisition. Submit a Work Request Form with Facilities Management via AIM online system or call the Front Desk at (415) 422 - 6464.	Purchase Order
Furniture -- classroom furniture: tables, chairs, tablet arm chairs, podiums, smart podiums, large whiteboards	USF has standardized on classroom furniture. Contact Facilities Management Front Desk at (415) 422--6464 to submit a Work Order Request prior to submitting a Purchase Requisition.	Purchase Order
Office furniture and workstations	USF has standardized on office furniture and has partnerships with vendors/manufacturers to provide discounted product pricing and space planning services for commercial contract furnishings. Please see the USF Office Furniture Catalog for dimensions, manufacturer specification, and finish details. For workstations, a collaboration between several USF departments and vendors for product specification, power/data/telecom requirements, etc. may be required. Submit a Furniture Request Form to purchasing@usfca.edu. NOTE: Furniture and layouts must be verified by Purchasing & Ancillary Services (PAAS) to ensure that mandated city/state/safety code and guidelines are adhered to.	Purchase Order
Public Space Furniture -- such as classroom furniture, public lounge furniture, cafeteria/kitchen furniture, conference/meeting room	For public spaces, Facilities Management must review and approve the request. Submit a Work Request Form with Facilities Management via AIM online system or call the Front Desk at (415) 422--6464. For lounge/seating/divider requests that are *internal* to a department's allocated space, submit a Furniture Request Form to purchasing@usfca.edu	Purchase Order

FOOD AND BEVERAGES

SERVICE, COMMODITY, EXPENDITURE	REQUIRED APPROVAL PROCESS	APPROVED BUYING METHOD
Alcohol Beverages -- on campus	Bon Appetit is USF's on--campus dining and catering provider. For alcoholic beverages for on-- campus events, please contact Events Management & Guest Services for more information or fill out an online catering request form.	University Contract
Alcohol Beverages -- other	For purchases under $2500, use a University issued P--card. For inquiries, contact Pcard Services. For large purchases or if you do not have a Pcard, submit a Purchase Requisition. See Small Dollar Purchase policy. For inquiries, contact Purchasing & Ancillary Services. NOTE: Whether it is a Pcard or PO, special handling is required for alcoholic beverages. Requestor, handler, and recipient must be 21+ years. Must show a valid form of government identification to pickup items at USF Central Receiving.	Purchase Order Pcard
Food Service -- on campus	Bon Appetit is USF's on--campus dining and catering provider. For alcoholic beverages for on-- campus events, please contact Events Management & Guest Services for more information or fill out an online catering request form.	University Contract
Vending -- snack and beverages	USF has contracts with Coca Cola and Canteen for vending services. Visit Vending Program for machine location. For additional products, machines, and inquiries, email purchasing@usfca.edu	University Contract
Water & Coffee Services	USF partners with Arrowhead for bottled water service, water filtration set up, coffee/beverage service, and corresponding supplies. Visit USF Water/Coffee Program for more information and pricing. Email purchasing@usfca.edu to request new/additional/modified services.	University Contract

FUNDING AND PAYMENTS

SERVICE, COMMODITY, EXPENDITURE	REQUIRED APPROVAL PROCESS	APPROVED BUYING METHOD
Endowment Funds: fund (FOAP) begins with 3	All requests utilizing a gift fund must be reviewed and approved by Elizabeth (Liz) Denefeld in Accounting and Business Services prior to purchase. Unless otherwise noted, follow Small Dollar Purchase policy.	Purchase Order Pcard
Gift Funds: fund (FOAP) begins with 2	All requests utilizing a gift fund must be reviewed and approved by Elizabeth (Liz) Denefeld in Accounting and Business Services prior to purchase. Unless otherwise noted in the grant guidelines, see Small Dollar Purchase policy.	Purchase Order Pcard
Grant Funds	All requests utilizing a grant fund must be reviewed and approved by Chavon Rosenthal in Office of Grants & Contracts prior to purchase. Unless otherwise noted in the grant guidelines, see Small Dollar Purchase policy.	University Contract Purchase Order Pcard

MAINTENANCE AND HAZMAT

SERVICE, COMMODITY, EXPENDITURE	REQUIRED APPROVAL PROCESS	APPROVED BUYING METHOD
Hazardous Materials (HAZMAT) & Controlled Substances	Hazardous material (HAZMAT) can be dangerous if not stored, handled, or disposed of properly. In addition, there are various building and fire codes that restrict the quantity of corrosive, flammable, oxidizing, pyrophoric, and toxic substances allowed in a building and lab. Contact Environmental Safety for approval prior to ordering.	Purchase Order
Cleaning Operations	Facilities Management manages the cleaning and maintenance service contract for the university. Contact Facilities Management Front Desk at (415) 422-6464 to place a Work Order Request to request additional services.	University Contract

MOVES AND RELOCATION

SERVICE, COMMODITY, EXPENDITURE	REQUIRED APPROVAL PROCESS	APPROVED BUYING METHOD
Moves and Relocation -- faculty/staff (out of state)	All employee move expenses must be coordinated by Human Resources.	University Contract
Moves and Relocation - offices at USF distributed campus	Contact Facilities Front Desk at (415) 422--6464 to place a Work Order Request. Labor will be contracted through a university--contracted vendor.	University Contract Purchase Order
Moves and Relocation - offices at USF main campus	All department move/relocation service efforts must be coordinated by Facilities Management to determine if labor should be provided in--house or university--contracted vendor. Contact Facilities Front Desk at (415) 422--6464 to place a Work Order Request.	University Contract

PRINTING SERVICES

SERVICE, COMMODITY, EXPENDITURE	REQUIRED APPROVAL PROCESS	APPROVED BUYING METHOD
Stationery, Letterhead, Business Cards	Standardized USF logo, specifications (paper/ink), and format has been provide to university-- contracted vendor. Contact Purchasing & Ancillary Services for additional information.	University Contract

SUPPLIES

SERVICE, COMMODITY, EXPENDITURE	REQUIRED APPROVAL PROCESS	APPROVED BUYING METHOD
Medical Equipment & Supplies	See USF Preferred Vendor List for a current listing of active vendors with order details such as a USF customer account number to ensure discounted pricing. Utilize See Small Dollar Purchase policy for method of buying.	Purchase Order Pcard
Office Supplies	Per university agreements with Office Depot and AAA Supplies, vendors will provide next day desktop delivery for in stock items. Both agreements are set up for Pcard & account billing which means that your FOAP(AL) will be charged after month--end. To set up a Central Stores account to order online, click here. Reminder: Please consolidate orders. For additional discounting on large dollar purchases/bulk requests and all other inquiries, email purchasing@usfca.edu.	University Contract Pcard

TECHNOLOGY

SERVICE, COMMODITY, EXPENDITURE	REQUIRED APPROVAL PROCESS	APPROVED BUYING METHOD
Computer Peripherals: monitors, docking stations, monitor arms (does not include printers, copiers, MFP -- then link it over)	Email itshelp@usfca.edu for assistance. Reference Small Dollar Purchase policy for buying method.	Pcard
Computer Software -- personal equipment	See list of software available for USF employees by visiting the USF eStore. Pricing is either free or at a discounted rate. Instructions for purchase can be found here. This is a personal expense and a credit card may be needed to secure order.	
Computer Software -- USF equipment	See list of software pre--approved by ITS. Contact ITS Help to install core software at no charge. Software that is not listed and requires a signed license must be reviewed and approved by emailing itshelp@usfca.edu. For inquiries, please contact ITS. Once approved, submit a Purchase Requisition to Purchasing & Ancillary Services.	Purchase Order
Computer Software License and Maintenance Agreements	Software requiring a signed license must be reviewed and approved by ITS by emailing itshelp@usfca.edu. For inquiries, please contact ITS. Once approved, submit a Purchase Requisition to Purchasing & Ancillary Services.	Purchase Order
Computer Systems -- major administrative systems, Networked (connected to USF network)	Computer systems must be reviewed and approved by ITS by emailing itshelp@usfca.edu. For inquiries, please contact ITS. NOTE: For major systems, ITS Project Management may require a Project Request document to be completed. Once vetted and approved, a Purchase Requisition should be submitted to Purchasing & Ancillary Services.	Purchase Order
Computer Tablet	See Tablet Computer policy. USF has standardized on the Apple Ipad. For other manufacturers, email requests to itshelp@usfca.edu ITS must review, approve, and inventory tag all tablets purchased with university funds.	Purchase Order
Computers	USF has standardized on computer laptop and desktop offerings. Please see link for specifications. Email itshelp@usfca.edu to request a new computer, replacement, and/or check on upgrade eligibility. For inquiries, contact ITS.	University Contract Purchase Order
Copiers, printers, multi-- functional devices	USF has contracted with MRC -- Xerox for copier/multi-- functional printers for both public and department use. Visit MFP Program for full details including device locations, price list, and tutorials. Contact purchasing@usfca.edu for inquiries regarding the program. For service issues, contact copycenter@usfca.edu.	University Contract
Technology purchases over $5K	Technology related purchases over $5K must be approved by ITS CIO. Email request to itshelp@usfca.edu	Purchase Order
Telecommunication Systems	USF ITS has standardized on university telecommunication system. Any modifications or new requirement requests must be approved by ITS. Email request to itshelp@usfca.edu	Purchase Order

TRAVEL AND ENTERTAINMENT

SERVICE, COMMODITY, EXPENDITURE	REQUIRED APPROVAL PROCESS	APPROVED BUYING METHOD
Travel Services	Utilize Concur Travel for your airline, hotel, and travel planning, booking, and reconciliation. For questions regarding this process or to request a Concur Pcard, contact Pcard Services.	University Contract Pcard