



University of California
San Francisco

Supply Chain Management

Demystifying the Procurement Process

November 15, 2022



Agenda



- Introduction to the procurement team
- Overview of procurement
- Tips to avoid delays
- Q & A
 - Please type your questions into the Zoom Q& A as we go

Note: This webinar will be recorded and posted on the Supply Chain Management website

Introductions

Strategic Procurement Team

Andrew Clark
Executive Director

David Pendergast
Manager, Contracting

Dean Shehu
Research Commodity Manager

Christina Morache
Manager

Tina Saloutos
Supervisor

Rose Hughes
Supervisor



Overview

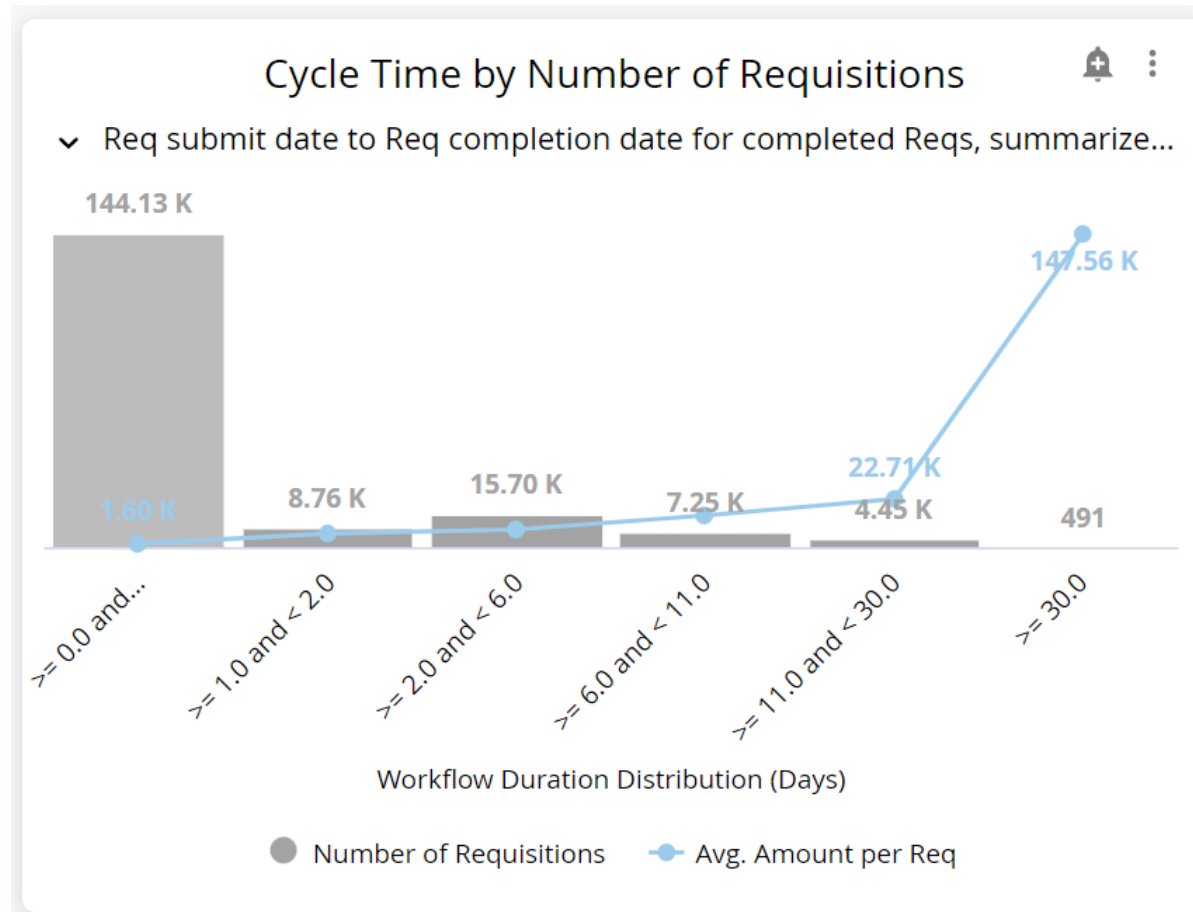
Public procurement is highly regulated and tightly governed

- Procurement cannot always waive requirements, but we can help with the process.
- UCSF needs to comply with laws/policies and we also must document our compliance.
- That is why we are sticklers about forms, justifications and wording on documentations.



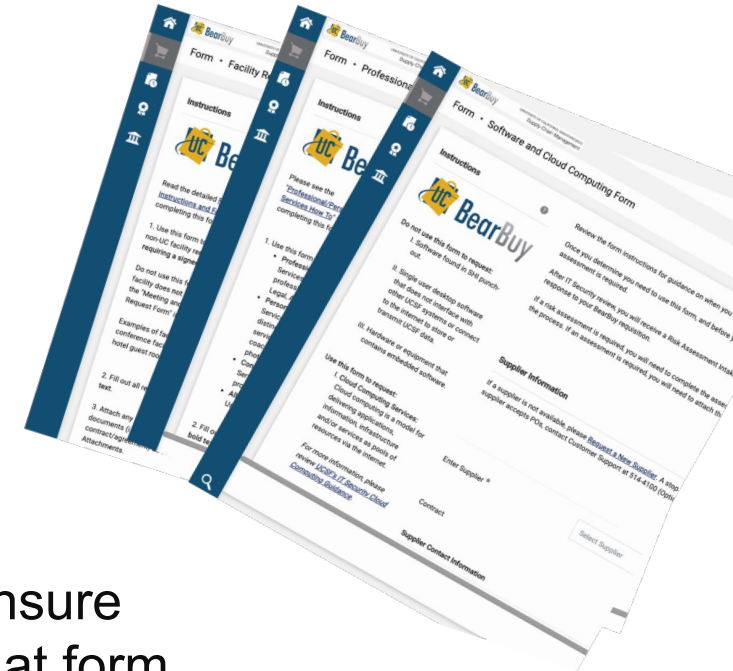
Requisition Processing

Most requisitions are processed within 10 days



Tip 1: Use the Correct BearBuy Form

- BearBuy has 14 different forms designed to collect information needed for each type of transaction.
- Some of that information drives special workflow and routing used to drive important parts of UCSF infrastructure.
- Check the left side of the BearBuy form to ensure your procurement fits the intended use for that form.



BEST PRACTICE

Tip 2: Read the Left Side of Form

- Sometimes, UCSF requires additional information to document your purchase.
- The left side of each form identifies the required documentation expected to accompany each requisition.
- Before submitting your requisition, make sure you've looked over the left side of the BearBuy form and have included any required documents.



BEST PRACTICE

Tip 3: When to Use SOW

- A statement of work (SOW) is used to describe complex services involving deliverables, timelines, quality assurances, etc.
- The supplier fills out the SOW and your team should read it carefully. This is the official record of what you are buying.
- Using the UCSF template ensures there are no “gotchas” in the document.
- Send your supplier the [UCSF template](#). Review what they write to make sure your needs are met before submitting to procurement.

BEST PRACTICE

Tip 4: Using a PO is the Fastest

- UC's purchase orders (POs) are legally binding and require us to pay the supplier for the goods/services they provide.
- In 80% of situations, UCSF does not require a dual-signed contract with the supplier.
- When you submit a supplier contract along with your order, we must negotiate it back to the PO terms and that usually takes 30 days.
- When a supplier asks you to accept their contract, let them know “negotiating a custom agreement will not work for your timeline and that UCSF uses purchase orders for procurement.” Otherwise, build in 30 days (at least) into your timeline for procurement.



BEST PRACTICE

Tip 5: Get the Taxes Right



BEST PRACTICE

- Goods are taxable.
- Services are non-taxable.
- Splitting out the taxable items from non-taxable items on your requisition will save UCSF money and time. When we over or under remit taxes it creates significant issues for UCSF with the State of California. Ask your supplier to split these out on the quote.

Tip 6: Source Justifications



BEST PRACTICE

- The source justification and price reasonableness form is the official record of how we met applicable laws, policies and procedures.
- The document should be completed according to the instructions and the content should tell a consistent and cohesive story.
- Before you complete the Source Justification and Price Reasonableness form, review the instructions. If your situation requires you to justify the procurement, review SCM's [Sole Source Justification Guide](#) for tips.

Questions & Answers

Please type your questions in the Zoom Q&A

A recording of this webinar will be posted on the [SCM Webinars page](#) within two days.

