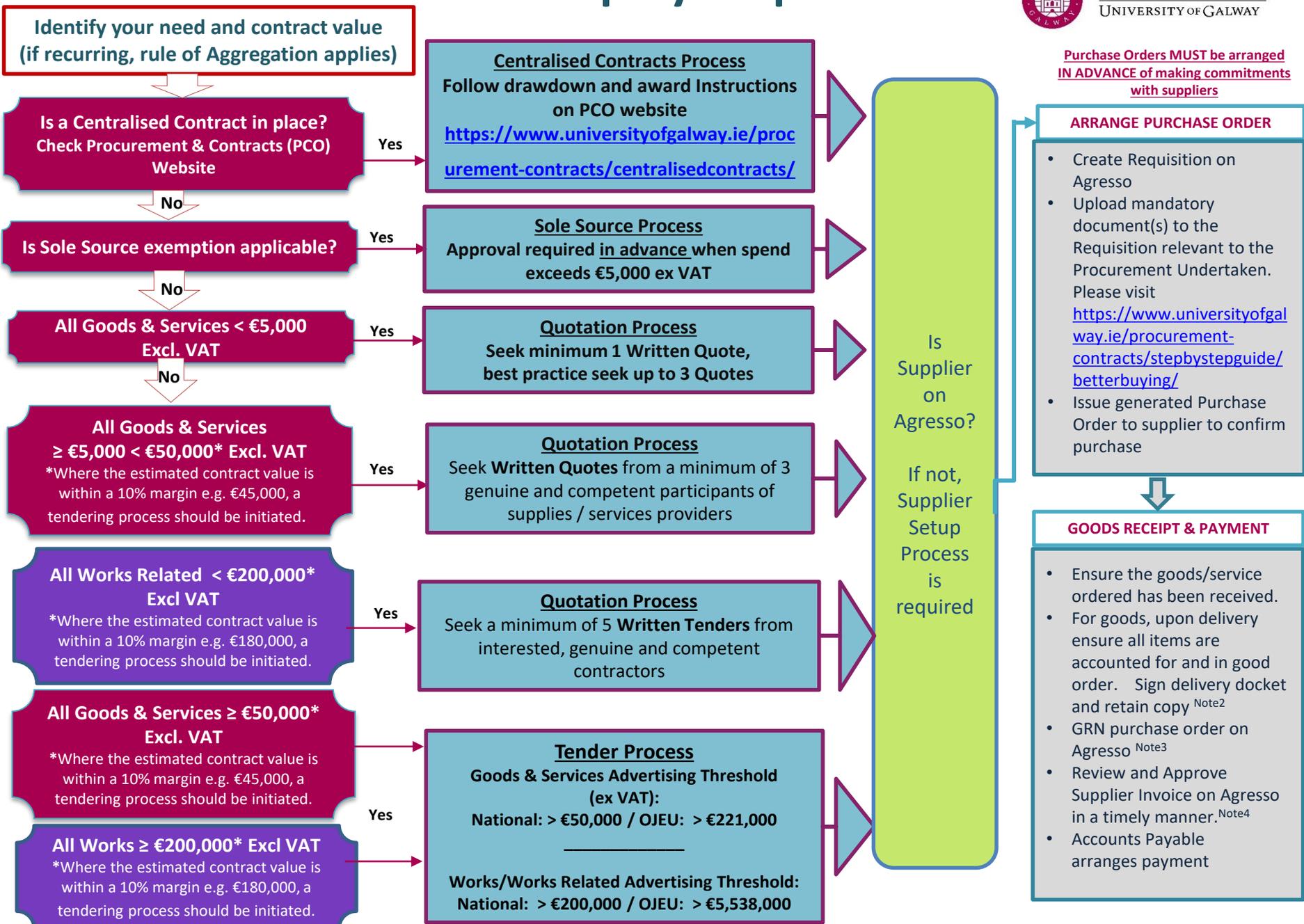


Procurement Step by Step Guide



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1. The **Rule of Aggregation** means the adding together of values of different contracts for the same supplies or services and treating the aggregated total value as a single amount for the purpose of procurement. See our Procurement Homepage for more details.
2. The total contract value (excl. VAT) will determine the Purchaser's necessary actions (i.e. quotation or tender process).
3. ALL AGRESSO Requisitions >€5k (excl. VAT) are required to upload documentary evidence of procurement process undertaken. See "**Guide to Procurement Process Undertaken**" on our website for details.
4. Purchasers MUST first determine if a Centralised Contract exists for their requirements. If a centralised contract is in place, Purchaser is obligated to use it, using the correct drawdown method as instructed on the PCO website. For contract values ≥€25k the Purchaser **MUST** complete a Contract Award Notification Form and upload to the Agresso Requisition. PCO will publish award details on the Government eTenders portal.
5. Purchasers should note the following when seeking Quotations:-
Template documents are available on the PCO website for all processes
 - a) Issue a written brief specification of requirements to suppliers
 - b) Seek quotes only from genuine participants applicable to the requirement
 - c) Allow a min 5 days for responses always detailing the closing date/time on the Request for Quote
 - d) Short written explanation should be kept on how value for money was achieved
 - e) Where a number of participants were invited to quote – a Quotation Evaluation document should be completed – template available on PCO website.
 - f) Once a Quotation Process is completed for contract values ≥€5k and < €50k, the Purchaser **MUST** complete a Contract Award Notification Form and upload to the Agresso Requisition
 - g) For contract values ≥€25k a copy of the CAN must also be submitted to procure@universityofgalway.ie and PCO will publish the award details on the Government eTenders portal.
6. Tendering exercise must be completed for all contract values ≥€50k*, (for goods/services) and >€200k* (for works and works related).
* Where estimated contract values are within a 10% margin of the tendering threshold, a tendering process should be initiated. Purchasers should note the following:-
 - a) A completed and signed Tender Initiation Form (TIF) along with a "final draft" Specification of Requirements is required to commence a tendering process including an SRFT process from an OGP/EPS, HSE or other Framework Agreement where the value exceeds €50k (excl. VAT).
 - b) Adequate time should be included in the planning stage of any purchase to allow the appropriate process to be conducted
7. Where a Sole Source process is required, then the Purchaser must download, complete and sign the Sole Source Form, and return along with the appropriate documentary evidence to Procurement & Contracts Office (PCO) procure@universityofgalway.ie for approval **in advance** of the issue of a Purchase Order (PO). For contract values ≥€25k the Purchaser **MUST** complete a Contract Award Notification Form and upload to the Agresso Requisition, sending a copy to the PCO. PCO will publish award details on the Government eTenders portal. The full Sole Source process is explained on the PCO website.
8. Purchasers must keep all records in relation to buying decisions – it is advised that such documentation should be kept in a "shared area" where it can be accessed by all staff involved in the Unit for auditing purposes. See Procurement Policy for checklist.
9. Procurement Training is mandatory for all staff involved in any activity of purchasing. Details can be found on our Procurement Homepage. Our Foundation suite of training is available online through Blackboard (Course reference AH0027).
10. All values mentioned above are exclusive of VAT.

Note:

Whatever procurement process is chosen, Purchasers will be required to evaluate responses received from suppliers against a set of criteria (e.g. meets our specifications, quality, price, lead-time etc.). These criteria should be considered by Purchasers before commencement of the relevant procurement process. If a supplier is chosen that the University of Galway has not done business with in the past, then the New Supplier Setup Process must be followed. This must be done at the outset so that the required PO can be raised. All staff have a responsibility when dealing with suppliers, to follow a code of conduct as set out in the **University's Code of Conduct for Staff**.

For full explanation on the above processes, including templates, go to www.universityofgalway.ie/procure/

Note 1.

If delivery cannot be verified – then the signatory should mark "unchecked" on the docket and within a period of 1 or 2 days, validate that the delivery is in good order. If not in good order, then "email" the Supplier and outline the issue. Do not GRN the PO until the matter is resolved.

Note 2.

Retain the signed copy of delivery note for 7 years.

Note 3.

The staff member performing the GRN should ensure that the delivery was signed off as "in good order". If not, **do not GRN**.

Note 4.

Suppliers must submit invoices to supplierinvoices@universityofgalway.ie.

Best practice is that the Requisitioner, the Goods Receiver and the Invoice Approver should all be different members of staff.