



UC San Diego

Policy & Procedure Manual

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PURCHASING

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UNIVERSITY PLANNED PURCHASING PROGRAM

I. REFERENCES

Systemwide Business and Finance Bulletin (BFB)

[BUS 29](#) Commodity Management Responsibility Assignments Section 6,
Planned Purchasing

II. RELATED POLICIES

UCSD Policy and Procedure Manual (PPM)

523-4.2 Low Value Purchases from Minority Business Enterprises

III. BACKGROUND

The Planned Purchasing Program was established in 1967. Under the Program, each campus Materiel Manager negotiates supply agreements for specific assigned commodities. This includes the investigation of usage, the evaluation of products, the development of sources, the preparation and execution of specified supply agreements, and management of supply agreements. The University Materiel Coordinator consolidates the efforts of each campus Materiel Manager and compiles a Master Index of Planned Purchasing Agreements for distribution to all University of California campuses.

IV. DEFINITIONS

A. Planned Purchasing Agreements

Planned Purchasing Agreements are pricing agreements between the University and specified vendors, usually at firm prices for stated periods of time. Agreements do not ordinarily specify definite quantities or guaranteed minimum quantities, but may be based upon an estimate of the needs of all University of California campuses.

B. State of California Contracts

State of California Contracts are established with vendors by the State Procurement Office for use by State supported agencies and educational institutions, including the University of California. Prices are generally firm-fixed and cover a specified period of time.

C. Index of University of California Planned Purchasing Agreement

The Index of University of California Supply Agreements is a reference listing the vendors and commodities under agreement to the University and the State of California. It contains: 1) Table of Contents of items covered by agreements 2) agreement number and vendor listing, and 3) vendor addresses.

D. Pool Purchases

Pool Purchases are orders negotiated by Systemwide with specified vendors for definite quantities or guaranteed minimums at firm prices during stated periods of time. Pool purchases are made on a regularly scheduled basis, usually once or more a year. Campuses issue orders calling for specific deliveries of pool purchase items. Examples of these items include: motor vehicles, police patches, residence hall furniture, calendar pads and some printed forms.

E. Campus Commodity Managers

Campus Commodity Managers are the Materiel Managers at each campus who, on a campus level, are responsible for the administration of agreements established by all University of California campuses. And, on a Systemwide basis, are responsible for the purchase, development, and management of the specified groups of commodities assigned to each campus.

V. POLICY

The University encourages the use of pool purchases and supply agreements to obtain the greatest economic advantage from planned quantity purchasing. A listing of University Supply Agreements and State of California Contracts will be made available by the Materiel Manager to all departments for their use.

VI. PROCEDURES

A. Supply Agreements

1. When departments place *Low Value Purchase Orders*, or when suggesting vendors on *Purchase Order Requisitions*, the Index of Planned Purchasing Agreements should be consulted and used.
2. Purchasing will also use vendors listed on the Index of Planned Purchasing Agreements when filling *Purchase Order Requisitions*, where possible.

B. Pool Purchases

Items listed on the University pool purchase list may not be purchased individually by departments except with the prior approval of the University Materiel Coordinator.

C. Exceptions to University of California Planned Purchasing Agreements

Items covered by Planned Purchasing Agreements should be purchased under the agreements with the following exceptions:

1. Emergency circumstances; and
2. Substantial difference in specification; or
3. Substantial difference in price.

D. Vendor Performance Reports

1. Departments may express satisfaction or dissatisfaction of a particular vendor's performance who appears on the Index of Planned Purchasing Agreements by filing a *Vendor Performance Report*. Items which may be covered include delivery, back orders, pricing, sales calls, etc.
2. The campus Materiel Manager may forward *Reports* to University Materiel Coordinator.

VII. RESPONSIBILITIES

A. Departments

1. Utilize pool purchases and Planned Purchasing Agreements in order to maximize the advantages and economies in quantity buying.
2. Submit *Vendor Performance Reports* to the Purchasing Division when appropriate as an aid in upgrading contracts and monitoring vendor's performance.

B. Commodity Manager/Materiel Manager

1. Coordinate the efforts of and maintain a liaison with departments in order to assure that the maximum purchasing advantage is secured for the campus.
2. Distribute procurement documentation and make available product information to campus personnel including the Index of Planned Purchasing Agreements.
3. Negotiate University of California Planned Purchasing Agreements for which San Diego Campus has commodity responsibility.
4. Require the Purchasing Division to utilize mandatory Planned Purchasing Agreements, and to prepare *Vendor Performance Reports* when necessary or desirable.