

# WELCOME

Procurement Services  
Hiring Consultants/ Professional Services



# Consulting vs Professional Services

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- **Consulting services are advisory services that provide expert guidance, strategic recommendations or analysis.**
  - Focus on strategy, recommendations, or decision support.
  - Diagnosing problems and advising
- **Professional Services are often technical, unique, and intellectual-services performed by qualified or licensed professionals**

**Defined deliverables**

**May be licensed or certified depending on field**

**Project-based & clearly defined**



# Sole Source Justification

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- > **A sole source because of unique characteristics or other reasons, are only available from a single source.**
- > **When an alternate supplier for a product or service cannot be identified, to the best of the requester's knowledge, based upon thorough research, a sole source justification must be provided.**
- > **The sole source justification should document the good faith effort made in searching for other suppliers, include a list of the unique technical specifications required of the product, and the companies that were contacted in the search for alternate sources.**
- > **Sole Source contracts using state funds (GOF) require pre-approval by DES; allow a minimum of 10 business days to review.**
- > **Please use the Sole Source Justification web form**  
**<https://finance.uw.edu/ps/form/sole-source-justification>**



# The Solicitation Process

Solicitation Process	Description of Process	Goods and Services
<b>Direct Buy</b>	Competition or justification for vendor selection is not required. Departments may place orders with supplier of choice within the direct buy limit without prior approval of Purchasing Services. Some exceptions may apply.	less than \$10,000 including shipping and handling, and excluding tax)
<b>Informal Competition</b>	Procurement Services Buyer will issue an informal solicitation to qualified suppliers. Responses may be provided by telephone or in writing (email, fax, or U.S. mail), depending on instructions from UW Buyer. If the solicitation is not advertised via Washington Electronic Business Solutions (WEBS) UW Procurement Service Buyer must include at least one minority and one woman owned business certified by the State Office of Minority and Woman Business Enterprise (OMWBE) in the solicitation process. (RCW 28B.10.029(c)(iii)	\$10,000 to less than \$100,000
<b>Formal Competition</b>	Procurement Services Buyer will issue a written solicitation and advertise via Washington Electronic Business Solutions (WEBS). Formal receipt process required.	\$100,000 and greater



# Purchase Orders or Agreements

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- A purchase order "confirms" and "officially" approves an agreement.
  - Can be a legally binding instrument protecting the UW and defining obligations
  - Scope of works/ quotes/agreements are incorporated into purchase order; often with UW terms and conditions.
  - Can be used as fiscal mechanism or means to transmit an order
- UW Agreements
  - There are times when a separate UW agreement may be utilized
    - As a result of competitive solicitation
    - The complexity of the purchase requires a separate agreement with additional terms and
    - Fred Hutch/other universities may require an executed contract besides a purchase order
    - Less than \$10k orders



# Training

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- > **The State of Washington requires all state employees whose jobs include procurement-related duties to fulfill certain training requirements under the procurement reform law (RCW 39.26.110) effective July 1, 2013.**
- > **Workday security roles that may be impacted by the training requirement includes: Buyer, Requisition Requester, and Share Environment Requisition Specialist.**
- > **<https://finance.uw.edu/ps/DES-training>**
  
- > **Workday Tutorials**
- > **<https://finance.uw.edu/ps/resources/trainings>**



# University Contacts

## Academy Procurement Services - Goods and Services

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- Kassy Ellefson [ellefson@uw.edu](mailto:ellefson@uw.edu) / Scientific
- Claudia Christensen [claudiac@uw.edu](mailto:claudiac@uw.edu) /Furniture - Small Business Administrator
- Robert Hardie / [bhardie@uw.edu](mailto:bhardie@uw.edu)/ - Tacoma Campus
- Ping Huang /[pinghuang@uw.edu](mailto:pinghuang@uw.edu) - Catering and Conferences
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- Silvia Andersen [silvif@uw.edu](mailto:silvif@uw.edu) -Consulting & Professional Services
- Chao Huang [chuang21@uw.edu](mailto:chuang21@uw.edu) - Bothell Campus
- August Armstrong [augustpa@uw.edu](mailto:augustpa@uw.edu) - *on leave*



# Q & A

