



# Facilities Operations

## Policy 1001 Purchasing Method

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<b>Responsible Office</b>	Office of Facilities	<b>Originally Issued</b>	4/30/18
<b>Responsible Official</b>	Lead Administrator	<b>Revision Date</b>	4/30/18

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### Scope

This document outlines the practices for purchasing goods and services through the FAMIS system used within Facilities Operations.

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### Policy Statement

Facilities personnel must purchase goods and services using practices that are compliant with federal and state laws and are aligned with Yale's best business practices. Furthermore, this document does not supersede Yale University's purchasing policies or procedures. This policy addresses the methods of procurement specifically for Facilities Operations within the FAMIS system.

Within the FAMIS system, purchase requisitions (PR's) are required to be created for all goods and services. Furthermore, there are two methods for creation of PR's:

1. Standard Process (PR is created and approved through the normal procurement process prior to goods or services being received or the goods are obtained internally from one of the Facilities inventory stockrooms)
2. Vendor Direct Process (PR is created after goods or services are received)

Facilities requires the standard process to be used consistently as the normal procurement process. However, given the nature of the services provided, there are situations that are time sensitive where the trades person or supervisor needs to obtain the goods or services through the second method (vendor direct process). Examples of time sensitive situations include: customer urgency, nature of repair requires immediate response (water leak, storm damage, public safety, etc.), unique job site situation results in efficiency from vendor direct process to help minimize labor time incurred, etc.

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### Reason for the Policy

In most cases, purchasing activity through Facilities Operations becomes the basis for charges/billings to Yale departments, units or schools outside of Facilities Operations. This policy helps to ensure procurement contains the appropriate level of management approval and efficient allocation of resources for the work performed by maximizing the use of the standard process. In addition, using the standard process creates purchase orders that carry Yale's terms and conditions and are not valid unless accepted by the supplier "prior" to providing goods or performing services (which is the case for the vendor direct process).

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### Definitions

Not applicable

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**Special Situations/Exceptions**

This policy does not apply to purchasing activity performed through other Yale approved systems (i.e., Workday, SciQuest, P-Card, PCS, ECAP, etc.)

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**Roles and Responsibilities**

Trade shop supervisors and Facilities Operations management is responsible for effective compliance with the above policy for their respective areas.

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**Related Information**

Not applicable

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**Contact Information**

Facilities Business Office

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**Revision History**

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