## Procurement Services Quick Reference

<table>
<thead>
<tr>
<th>Transaction Types &amp; Procurement Methods</th>
<th>Transaction Type</th>
<th>Procurement Method</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Travel &amp; Entertainment</td>
<td>University P-Card</td>
</tr>
<tr>
<td></td>
<td>Goods &amp; Services from an existing supplier</td>
<td>Workday Purchase Order</td>
</tr>
<tr>
<td></td>
<td>Goods less than $2500 purchased from a <strong>new supplier</strong> that will be used on a one time basis</td>
<td>University P-Card</td>
</tr>
<tr>
<td></td>
<td>All other Goods &amp; Services from a <strong>new supplier</strong></td>
<td>Workday Purchase Order (complete Create Supplier Request in Workday first)</td>
</tr>
<tr>
<td></td>
<td>If asked to sign a <strong>Contract</strong></td>
<td>Contact Procurement Services</td>
</tr>
</tbody>
</table>

*For any questions call Procurement Services at UBUY (8289)*

### Obtaining Bids/Quotations

<table>
<thead>
<tr>
<th>Value</th>
<th>Guidelines</th>
</tr>
</thead>
</table>
| $10,000 or less        | • Competitive quotations are not required if the purchaser considers the price to be reasonable  
                         • Purchases must be distributed equitably among qualified suppliers to the extent practicable |
| Over $10,000 to $75,000| • Three formal, written quotations on supplier letterhead are required |
| Greater than $75,000   | • Detailed, written scope should be prepared as part of the formal bidding process which includes a Request for Proposal (RFP) or Request for Quotation (RFQ) followed by a formal award of the bid |
## Exclusions & Special Situations

The following do not require bids & quotations. *
Preferred procurement methods are on the reverse.
For any questions regarding the best way to purchase these items, contact Procurement Services at UBUY (8289)

*Procurement Services will obtain bids & quotes for these items if requested.

<table>
<thead>
<tr>
<th>Dues &amp; subscriptions</th>
<th>Library resource materials</th>
</tr>
</thead>
<tbody>
<tr>
<td>Travel fees including travel agencies, airlines, car rentals &amp; hotels (except charter agreements for buses &amp; airfare)</td>
<td>Booth space at conferences, exhibits, fairs &amp; product shows</td>
</tr>
<tr>
<td>Utilities</td>
<td>Security &amp; Police Officers provided by local governments</td>
</tr>
<tr>
<td>Academic testing services &amp; accreditation fees</td>
<td>Drugs &amp; pharmaceuticals</td>
</tr>
<tr>
<td>Newspaper ads</td>
<td>Insurance</td>
</tr>
<tr>
<td>Shipping charges</td>
<td>Catering services &amp; expenses related to Wake Forest sponsored conferences, seminars &amp; meetings</td>
</tr>
<tr>
<td>Training &amp; conference registrations</td>
<td>Contracts for institutions, individuals &amp; businesses named in grant awards</td>
</tr>
<tr>
<td>Artists, original works of art, photographers, authors, &amp; writers</td>
<td>Advertising</td>
</tr>
<tr>
<td>Cost of employee recruitment prior to hire</td>
<td></td>
</tr>
</tbody>
</table>