

QUICK GUIDE

STEPS FOR PROCUREMENT VALUED UP TO TT\$15,000

Instructions: to be used for all procurement valued up to TT\$15,000, excluding petty cash purchases. All procurement above this value must utilize the Procurement Requisition (PR) Form.

STEP	DESCRIPTION	AREA OF RESPONSIBILITY
Procurement Requisitioning Process: Steps 1-5		
1	User Faculty/Department (Procurement Executing Arm, PEA) identifies need for goods/works/services.	Faculty's/Department's Admin. Asst. or Purchasing Rep.
2	PEA emails respective Bursary Budgetary Clerk/Accounting Assistant requesting confirmation on availability of funds (Budgets, Students and Receivables or Special Projects). Email to briefly summarize the following: <ul style="list-style-type: none"> • Description of goods/services/works required • Justification for purchase • Estimated value of goods/services/works • Any details on possible funding sources 	Faculty's/Department's Admin. Asst. or Purchasing Rep.
3	Relevant Bursary Section responds to PEA confirming the availability of funding.	Bursary Section: Budgets, Student and Receivables Special Projects
4	Based on confirmation of funding received, prepare and submit to Dean/HoD a brief memo requesting approval to proceed with procurement, including the following details: <ul style="list-style-type: none"> • Description of goods/services/works required • Justification for purchase • List of prospective vendors to be invited (minimum of three) • Justification for single/sole source (where applicable) • Estimated value of goods/services/works • Attach Bursary's email confirmatory email on availability of funding. <p>NB: This step is important as the approved memo and supporting data will be used as a basis for the Bursary's approval of the purchase order in Step 10 below</p>	Faculty's/Department's Admin. Asst. or Purchasing Rep.
5	Memo to proceed with the procurement is approved.	Dean/HOD
Solicitation process		
6	Prepare RFQ document/ email solicitation correspondence and issue to a minimum of three (3) prospective vendors as specified in approved memo in Step 4 above. <p>NB:</p> <ul style="list-style-type: none"> i. A minimum of three (3) vendors must be invited to submit quotations (unless the single/sole source procurement method is being utilized) which must also be sufficiently justified as part of Step 3 above. 	Faculty's/Department's Admin. Asst. or Purchasing Rep.

STEP	DESCRIPTION	AREA OF RESPONSIBILITY
6 cont'd	ii. All quotations received should be evaluated even where The UWI receives less than 3 quotations in response to the request. It is important that evidence of The UWI-issued RFQ to each vendor be included as part of Steps 7 and 9 below for transparency and auditing purposes. iii. The UWI does not accept verbal quotations. All requests for quotations and receipt of same must be communicated in writing (via email or physical copy). Verbal inquiries on prices must be followed by at least an email confirmation of the final price and other details discussed.	
Evaluation, Award and Purchase Order process: Steps 7-11		
7	Evaluate all quotations received, utilizing the simple Evaluation Report template which can be found on the Procurement Unit's webpage. Submit final evaluation report with recommendation for preferred vendor for approval by Dean/HOD.	Faculty's/Department's Admin. Asst. or Purchasing Rep.
8	Evaluation report is approved.	Dean/HOD
9	Prepare Purchase Order (PO) and submit to Bursary for processing. Attach the following supporting documents: <ul style="list-style-type: none"> • Approved Memo from Step 4 above • RFQ or copy of email request from Step 6 above • Quotations from vendors • Approved evaluation report. 	Faculty's/Department's Admin. Asst. or Purchasing Rep.
10	PO is approved.	Bursary
11	Submit PO to vendor for delivery of goods/services/works.	Faculty's/Department's Admin. Asst. or Purchasing Rep.
Receipt of goods/services/works and payment of vendor: Steps 12-15		
12	Goods, services, works delivered or received.	Vendor
13	Receive invoice and process for payment.	Faculty's/Department's Admin. Asst. or Purchasing Rep.
14	Vendor receives payment.	Bursary
15	File all documents: <ul style="list-style-type: none"> • Approved memo • RFQ or email requesting quotations • Quotations received • Approved evaluation report • Approved PO • Invoice. 	Faculty's/Department's Admin. Asst. or Purchasing Rep.