Procurement: Curriculum Plan
Johns Hopkins University

Panel Members:

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Debbie Coppock, Medicine
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Debbie Jackson, University Administration
Rachel Kiel, Homewood Student Affairs
Belinda Kopp, Hygiene and Public Health
Kristine Puyear, Engineering
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Purchasing/Accounts Payable: Core Content

The panel was asked to review the Core Content and make any adjustments needed to insure that the material covered did not conflict with the content of this curriculum plan. They made two minor edits and what follows reflects the final content on Purchasing/Accounts Payable:

Core Content:

♦ Knowledge of the Ways to Purchase/Reimburse at JHU and Contacts/Resources
♦ Tax Exempt
♦ Authorization Process (regulations allowable)
♦ Central Contacts
♦ Petty Cash: It may exist (cash and/or checking)

Outcomes:

Upon completion of this course the participant will be able to:

➢ Identify the most appropriate* methods to procure goods and services from internal and external vendors.
➢ Identify the central contacts/locations and know the information/services available.
➢ Explain JHU tax exempt status and the impact it has on purchases/reimbursements
➢ Describe the levels of authorization required to procure goods and services for both sponsored and non-sponsored funds
➢ Locate web sites as a source of information and support.

* Added by the panel
Principles of the JHU Procurement Process

Student Profile:

This course is designed for employees who meet the following criteria:

- New employees to JHU or a current employee transferring to a new position with purchasing responsibilities
- May be employees a all levels of the University i.e., administrators, clerks, etc.
- Have completed the core module
- Employees who have knowledge/understanding of JHU Account Codes
- Possess basic math, basic computer and communication skills

Course Content:

Tasks:

A-1 Determine the item to be purchased and it's value
A-2 Determine when item is needed
A-3 Determine preferred vendor (external/external) and vendor requirements
A-4 Evaluate purchasing/payment options**
   - Purchase Requisition
   - Travel Advance
   - Travel Reimbursement
   - Coded Invoice
   - M&S/EMNS (internal purchases)
   - VISA Procurement Card
   - Check Requisition
   - Petty Cash
   - Purchases from JHU

Special Circumstances
   - Contract
   - RFP
   - Independent Contractor/Consultant
   - Subcontractors
A-5 Evaluate pros and cons of various payment options
A-6 Determine required JHU authorizations
A-7 Select method and follow procedures
*1 Utilize procurement website resource

Knowledge and Skills

KS-4 Knowledge of JHU Accounting System/Budget Numbers Object Codes, etc.
*2 Decentralization Philosophy

* Added by the panel
** Information on payment options will include:
   - Definition
   - Process description
   - Forms Used (paper and electronic)
   - Contracts
   - System Access

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<th>Learning Outcomes</th>
<th>Outcome Indicators:</th>
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<td>Given the need to purchase goods and/or services the participant will be able to select the appropriate methods</td>
<td>The participant will demonstrate the ability to:</td>
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<td>Appropriate form(s) has been completed with the required authorization and forward to the correct</td>
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| to obtain and pay for the goods/services | department in a timely manner  
- The purchase has been applied to correct account(s) and object code(s)  
- Payment/encumbrance has been reflected on the expenditure statement  
- Goods have been received or service is completed |
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<td>Given a specific procurement situation the participant will be able to identify the need for additional processes/steps (contract, RFP, independent contractors, sub-contractors)</td>
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- Appropriate documentation is obtained and forwarded to the correct area of Central Administration  
- The department receives a copy of a fully executed contract and/or purchase order  
- The service is completed |
| Given the need for information the participant will be able to access and utilize the Procurement Web-based Resource |  
- Log on to the web site  
- Navigate through the site  
- Communicate the information to others  
- Act as a resource to others/show others how to use the site |

**Procurement Website Resource**

The panel recommended the development of a website that will act as a resource to all employees for purchasing. The site would link users to a step-by-process guide to making any type of purchase. Users may enter the site by selecting a type of purchase or by selecting a commodity to purchase (that will include vendor information) that will take them through the process of making the purchase. The Principles of the JHU Procurement Process class will teach how to navigate through the website.
**Issues and Suggestions:**

1. The panel recommended the development of a web-based E210 course that would be targeted to administrators, supervisors, etc. those employees who verify or approve payroll forms and/or are responsible for hiring students.

2. The panel added the philosophy of decentralization to the Principles of the JHU Procurement Process course and wanted to note that the following information should be addressed:

   Decentralization allows the freedom for employees to make purchases and with that comes the responsibility to comply with JHU policies to make appropriate purchasing decisions. Procurement must be in compliance with funding sources and employees should be good stewards of the funding by practicing prudent spending that meet Federal, University and sponsor initiated audits. Central Administration shares this responsibility with divisions and departments to carryout the business activities for the University