



# Account Manager Training

Presented by: Business Services Department  
Purchasing Department  
March/April 2017



TEXAS SOUTHMOST  
COLLEGE



# Authorized Account Managers

## President (*examples of some accounts*)

- Board of Trustees
- Human Resources
- Institutional Planning Research and Effectiveness
- General Institutional Support

## Vice President of Finance and Administration (*examples of some accounts*)

- Business Services
- Child Care Center
- Information Technology Services
- Inventory Control
- Physical Plant and Facilities
- Purchasing and Records Retention

## Vice President of Institutional Advancement and Workforce Training (*examples of some accounts*)

- Grants Development and Administration
- Marketing and Community Relations
- Media Services
- Workforce Training



# Authorized Account Managers

## Vice President of Instruction *(examples of some accounts)*

- Dean of College Prep Studies
- Dean of Health Professions
- Dean of Humanities
- Dean of STEM and Career Technical Education
- Educational Technology and Curricular Innovation
- Dual Enrollment

## Vice President of Student Services *(examples of some accounts)*

- Admissions and Records
- Advising and Orientation
- Disability Services
- Financial Aid
- Recreation Center
- Student Life
- Student Activities
- Testing



# Responsibilities

1. Identifying, acknowledging, and accepting purchasing needs for the division's course, program, department, or office requirements according to the goals, objectives, and mission statement of the College.
2. Ensuring that purchasing requests are conducted based on the fiscal integrity of the College and in compliance with TSC policies and procedures.
3. Approving all PRs for delegated accounts. PRs of \$10K and over will require the approval of the President.



# Summary of Purchasing Methods and Requirements

Level of Purchase	Purchase Amount	Type of Goods and Services	Purchasing Method	Requirement
Level I	Less than \$2,000	All Goods/Services	No Bidding Required	Quote/Estimate from one vendor
Level II	\$2,000 but Less than \$25,000  Only applicable to purchases of less than \$10,000	All Goods/Services	-Quote/Price Comparison  -Sole Source  DIR and other Purchasing Co-Ops <i>(All processes managed by Department)</i>	-Three (3) Written Quotes or Responses from different vendors  -Quote from one vendor/Sole Source Justification Form/Vendor Letter  Quote from one vendor stating the Contract Number
Level III	\$25,000 or More	-Goods -Combined Goods and Services  Common Services  Professional Services  Construction Services	-Invitation for Bid (IFB) -Request for Competitive Sealed Proposals (RFP)  Request for Competitive Sealed Proposals (RFP)  Request for Qualifications (RFQ)  -Request for Competitive Sealed Proposals (RFP) -Construction Manager-at-Risk (CM@R) -Design-Build (DB) -Job Order Contracting (JOC) <i>(All processes managed by Purchasing Staff)</i>	-Submit Request for Formal Competitive Bidding Process Form *Newspaper Advertisements *Website Posting *Sealed Bids or Proposals *Strict Submission Deadline *Evaluation Committee  -Request must be submitted within at least 6 months prior to obtaining Board Approval.

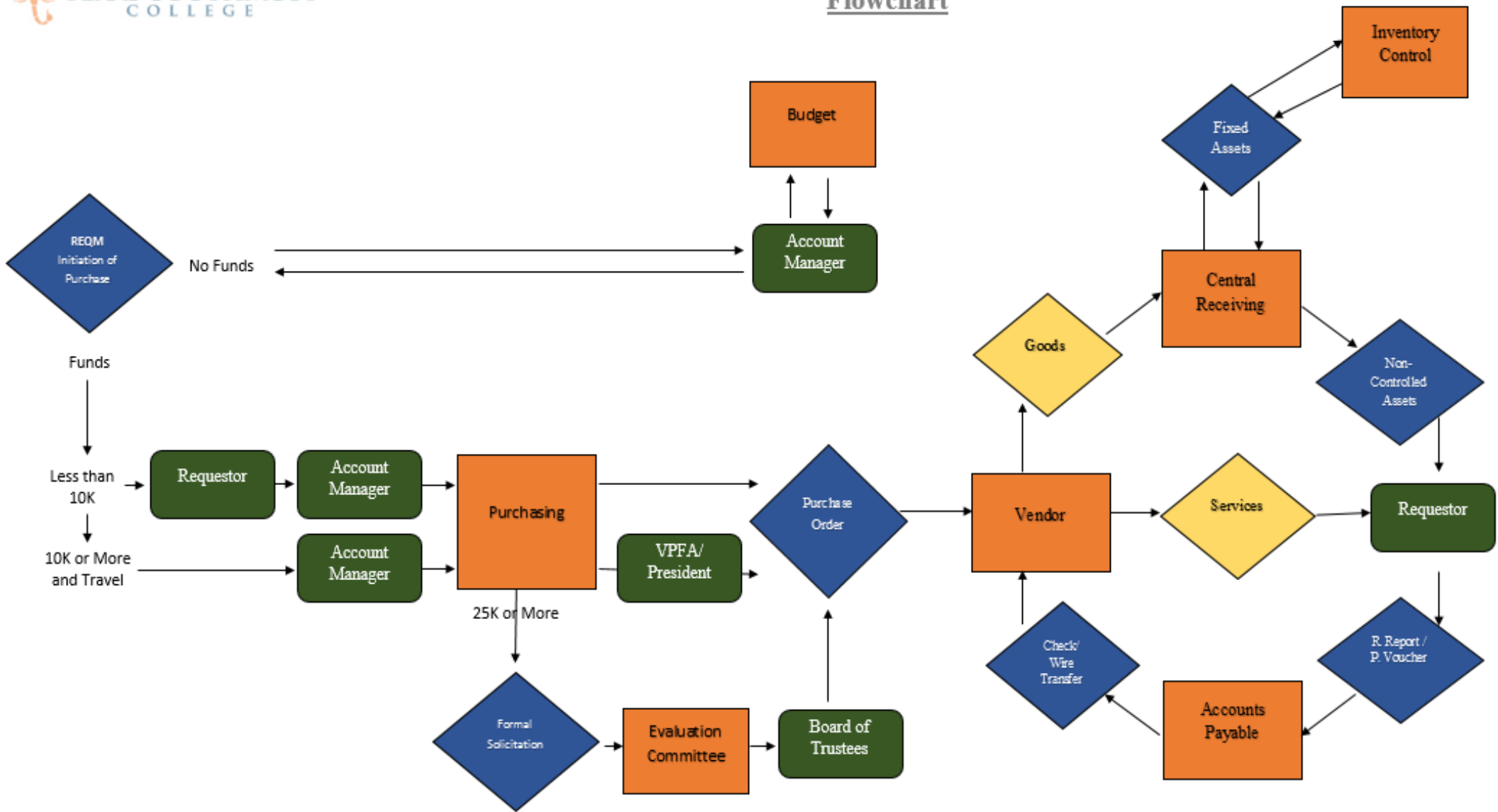


# Delegation of Authority to Approve PRs and Contracts

Level of Approval	Contract Amount	Type of Goods and Services	Approvers	Final Approval Authority
Level I	Less than \$10,000	All Goods/Services	Account Supervisor	Account Manager
Level II	\$10,000 but Less than \$25,000	All Goods/Services	Account Supervisor Account Manager VP of Finance & Adm.	President
Level III	\$25,000 or More	-Goods -Combined Goods and Services	Account Supervisor Account Manager VP of Finance & Adm. President	Board of Trustees
		Common Services		
		Professional Services		
		Construction Services		
Level IV	Any	Travel Services	Account Supervisor Account Manager VP of Finance & Adm.	President



# Procurement Process Flowchart





# Estimated Processing Days as of April 3, 2017

Processing of Purchase Order (less than \$10K): **3 to 5 business days**

Approval and Processing of Purchase Order (\$10K but less than \$25K): **7 to 15 business days**

Approval and Processing of Purchase Order (\$25K or more): **90 business days**

Approval and Processing of Travel Requests: **7 to 20 business days**

Processing of Check/Wire Transfer: **7 to 15 business days**