



3210 PURCHASE CONTRACTS POLICY AND PROCEDURES

SUMMARY

Policy 3210 Professional Services and Consulting has been renamed and revised to be an all-inclusive **Purchase Contracts** Policy that outlines the contracting requirements and processes for goods and services.

This update incorporates purchase categories that were not previously captured and provides improved definitions and guidance to the Yale community. It introduces new Procedures that detail the documentation and regulatory requirements and associated processes.

SCOPE

Revamp Policy 3210 Professional Services and Consulting | Introduce new 3210 Purchase Contracts Policy | Create New 3210 Procedures

FOCUS AREAS

3210 PURCHASE CONTRACTS POLICY - UPDATED

**3210 PR.01 SERVICES CONTRACTS PROCESS
UPDATED**

**3210 PR.03 PROCESS FOR PURCHASE CONTRACTS
FOR SOFTWARE, WEB DEVELOPMENT SERVICES,
ELECTRONIC APPLICATIONS, AND DATA USE
AGREEMENTS
NEW**

**3210 PR.04 STATEMENTS OF WORK
NEW**

**3210 PR.05 GOODS CONTRACTS PROCESS
NEW**

WHAT'S NEW

Contracts Categorization, Definitions and Guidance on:

- General/Miscellaneous Services Contracts
- Guest Speaker Contracts and Honoraria
- Purchase Contracts for Software, Web Development Services, and Electronic Applications
- Data Use Agreements
- Purchase Contracts that Provide Access to Yale Data
- Purchase Contracts Involving Payment Card Processing
- Purchase Contracts for Specialized Services
- Purchase Contracts Requiring Additional Reviews or Approvals
- Goods Contracts
- Mixed (Services/Goods) Contracts
- Statements of Work

BENEFITS OF THE CHANGE

- Transform Purchasing's policy approach
- Introduce a Purchase Contracts Policy inclusive of both goods and services
- Provide better clarity and guidance to the Yale community on how to purchase and contract
- Define categories and outline processes not previously included in the Policies and Procedures
- Capture regulatory requirements
- Include new Contracts/Addendums
- Address internal and external audit findings