The Contracts and Compliance Office is pleased to introduce its first newsletter. This publication is designed as a tool to provide the university community with some insight on Procurement-related issues. It will provide updates on regulations, policies and procedures, new initiatives, training workshops information, statistical information, etc. The Contracts and Compliance Office is composed of three departments. One is the Procurement Department, with three component areas: Purchasing, ProCard and Central Receiving. Also under the Contracts and Compliance umbrella are the Property Department and the Environmental Health and Safety Department.

Darryl Mayers is the Assistant Vice Chancellor for Contracts and Compliance. Darryl is responsible for the Procurement Department, Property Department, and Environmental Health and Safety. Darryl represents our campus at the UMass Purchasing Council meetings, which includes Procurement Directors from each campus. The Purchasing Council provides a continuous focus on cost-savings opportunities for the university’s procurement efforts, seeking to ensure that the university receives the best value for every dollar spent on goods and services procured. Driving costs down by initiating campuswide procurements, creating greater efficiencies through purchasing tools and electronic commerce and the utilization of purchasing consortiums are just a few examples of the Council’s responsibilities. The Council also reviews policies and procedures and procurement-related documentation.

Darryl also serves on a number of committees on campus including the Workforce Safety and Health Committee, Finance and Grants Council, Master Plan Committee, and Safety Committee. Based on the dollar amount and duration of contracts, Darryl has signature approval for service contracts, licenses, leases as well as purchase orders. He is also the university’s designated official for records retention and is the Risk Manager for UMass Boston at the UMass Risk Manager’s Council. “As UMass Boston continues to grow as a world-class university, we must understand that increased growth coupled with budgetary constraints will require greater efficiencies, ingenuity, as well as productivity. Our goal in Procurement, Property, and Environmental Health and Safety will be to provide our campus with the tools and processes it needs to excel, to provide first-class customer service, and to provide a safe and cost-effective environment for our campus to grow.”
TRAINING SCHEDULE
Purchase of Good and Services

August 24
September 30
October 26
November 18
December 13

Contracts & Compliance
Page 2 of 4

Procurement Department

Purchasing

Janis Mahoney is the Buyer for professional contracts, licenses (computer software), and service-related requisitions. She has over 35 years of experience in Procurement and is a Massachusetts Certified Public Purchasing Officer (MCPPO). Janis serves on the Purchasing Council, attending monthly meetings and working with representatives from other UMass campuses on purchasing policy and contract-related issues. She also conducts monthly training sessions on purchasing policy and procedures for faculty and staff.

Cathy Hennessey is the Buyer for commodity-related requisition. She serves as the purchasing representative on the Finance Core Team. The core team includes purchasing representatives from each campus who meet monthly to review PeopleSoft operational issues related to Procurement. Cathy is also responsible for the training sessions and materials related to the ePro purchasing system.

Martha Kelly is the Contract Manager. She prepares labor and material contracts for building or ground structures that we repair or construct. This aspect of Procurement is regulated by Massachusetts General Law’s c149 and c30-39M. In addition to the Labor & Material contracts, Martha has various other functions, such as maintaining the Contract & Compliance website which includes (Purchasing, ProCard, Property, Receiving, and Environmental Health & Safety). Martha is an Associate MCPPO and a Notary Public.

Louise Bostic is responsible for the completeness of all contracts. She assists Janis and Martha with the preparation, obtaining signatures, and distribution of contracts. Louise also assists with the Procurement help line and any questions related to the preparation of contracts. Louise manages all State MMARS service-related purchase orders on the State finance system.

Anita Thompson maintains the Procurement help line. She also greets our steady stream of visitors and helps out with the myriad of department purchases. Anita is the SME (subject matter expert) for the ePro data entry training class for new and existing staff.

Anita serves on the Massachusetts Higher Education Consortium (MHEC) contract team. The MHEC team meets quarterly to review new contracts and to meet new-vendor representatives. She is the expert on utilizing the MHEC or State contract websites, searching for the best price for your purchase.

ProCard

Eden Medaglia is responsible for the Procurement card (ProCard) program on our campus and manages the Property Department. The ProCard program is the preferred way of purchasing allowable items that are <$1,000.00. Eden’s responsibilities include the administration of the ProCard program, training new cardholders, refresher classes, and post audits.

The ProCard is to be used only for purchases related to university business and must be used in accordance with the ProCard User Guide. Users are encouraged to refer to the ProCard section of the Contracts and Compliance website to see the Allowable/Restricted list, current ProCard forms, and general information on the ProCard program.
Central Receiving

The Receiving Department is responsible for recording all packages from UPS, FedEx, Hub, and any other trucking companies that deliver directly to UMass Boston. Receiving also surpluses and distributes furniture. Furniture stored by receiving generally contains used file cabinets, bookshelves, chairs, desks, and work tables. The receiving page under the Procurement Department website contains an illustration of available furniture.

The following personnel are assigned to the Central Receiving staff: Kenneth Nolte, Ruberquiz Sanchez, James Egan, James Glen, and Edward Gonzalves.

Property Department

The Property Department is responsible for the development and implementation of university and campus policies covering inventory control for Moveable Equipment, managing and conducting biennial physical inventories of university and federal equipment, maintaining inventory records of moveable equipment within the Asset Management System (AMS).

In addition, the Property Department manages the bar-coding and tracking of Moveable Equipment, processing equipment transfer forms, trade-ins, and on-line retirements (surplus, lost/stolen, etc). Eden Medaglia oversees the Property Department. The following personnel are also assigned to the Property Department staff: Daniel Santos and Stephen Sullivan; they ensure that equipment is bar-coded, entered into the PeopleSoft asset module and the physical inventory of equipment.

Environmental Health & Safety

Under the directorship of Brian Dumser, the EH&S Office has the overall responsibility and authority to develop policies, programs, and procedures to maintain a healthful and safe campus environment for all faculty, staff, and students. Program areas include pollution prevention, environmental regulatory compliance, hazardous materials management, laboratory chemical, biological, and radiation health and safety, fire safety, life safety and emergency evacuation, worker protection, and industrial hygiene. All EH&S initiatives are based on generally-accepted standards of care, which include applicable federal and state regulation, nationally recognized codes, and established professional practices. Providing these EH&S services in the diverse university culture is a challenging responsibility that requires the EH&S professional staff to operate as an interactive, cross-functional team to find creative ways to ensure that implementation enhances and supports the university’s educational and research objectives. The following personnel are assigned to the EH&S staff: Zehra Schneider Graham, (Deputy Director, Environmental), Lalitha Adusumilli (Assistant Director, Environmental), Debra Gursha (Fire and Life Safety Officer), and Kathy Evelyn (Office Manager). EH&S takes great pride in the development of innovative and effective approaches to address the unique needs and rapidly changing technology in the university research and development sector. To this end, they interact closely with the regulatory community, and have been instrumental in changing Federal legislation regulating laboratory chemical waste, and municipal regulation addressing biological pathogens.

Contracts

Departments should purchase goods and services using the following available contracts:

- MHEC contracts http://www.mhec.net/
- State contracts http://www.ebidsourcing.com/
- USAVE contracts http://usave.umassp.edu
Contracts & Compliance

Highlights

The Property Department and campus departments have successfully completed the Federal Moveable Equipment Inventory. This is an important achievement as a major research university. Inventory reports for departments are being created in FAIR and will be available for the next campus-wide inventory.

The Procurement Department Internal Control Plan was updated in June. It introduces the segregation of duties for purchasing and monthly approval of ProCard statements. The plan is located on the A&F website:

www.umb.edu/administration_finance.

There is a new Contract for Services form on the Contracts and Compliance website:

www.umb.edu/administration_finance/contractsandcompliance

The Purchasing Council recently awarded contracts to Dell and Lenovo for the purchase of desktop and mobile computing products.

The university also receives educational pricing for both institutional and personal purchases through the Apple Education Store. You can access these contracts at the following website:

http://usave.umassp.edu

On August 5, an MHEC training was held on campus to introduce their new website and to stress the advantages of using MHEC contracts. The department received positive feedback from the 35 employees in attendance.

Purchasing Snapshot

<table>
<thead>
<tr>
<th>Procurement Purchase Orders for FY10</th>
</tr>
</thead>
<tbody>
<tr>
<td>Breakdown of Orders</td>
</tr>
<tr>
<td>---------------------</td>
</tr>
<tr>
<td>Marketplace Orders</td>
</tr>
<tr>
<td>Non-Marketplace Orders</td>
</tr>
<tr>
<td>Total</td>
</tr>
<tr>
<td>70% of purchase orders were issued within 3 days</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>ProCard Orders for FY10</th>
</tr>
</thead>
<tbody>
<tr>
<td># of Transactions</td>
</tr>
<tr>
<td>Amount</td>
</tr>
<tr>
<td>97% transactions &lt;$1,000</td>
</tr>
</tbody>
</table>

Training

The following training classes are required for those with purchasing responsibility: ePro, Procurement of Goods and Services and ProCard.

Staff can now sign up online to attend ePro training through the UMass Boston Training Portal: http://www.umb.edu/training/.

To attend the Procurement of Goods and Services workshop, staff can now sign up online to attend ePro training through the UMass Boston Training Portal: http://www.umb.edu/training/.

ProCard classes can be scheduled by contacting Eden Medaglia at (617) 287-5063 or emailing eden.medaglia@umb

Inventory Control Policies and Procedures workshop classes can be scheduled by contacting Eden Medaglia at (617) 287-5063 or emailing eden.medaglia@umb