Purchase of Goods Policy
Competitive Procurement Contracts

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- **Contracts & Compliance Office**
  The Contracts and Compliance Office is committed to providing the campus community with information, and assistance that will enable the most cost effective and appropriate acquisition of goods and services in accordance with all applicable laws, regulations, and policies.
- The Contracts and Compliance Office is comprised of three departments:
  1. Procurement
  2. Property
  3. Environmental Health and Safety

- The Procurement Department is made up of three component areas:
  1. Purchasing
  2. Procard
  3. Central Receiving
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Contracts & Compliance

**Procurement**

- Purchasing Policies & Procedures
  - Account Codes
  - Honoraria
  - Consultant Services
  - Operational Services
  - Maintenance Agreement
  - Stipends
  - Alterations to Plant
  - Information Technology
  - Purchase Orders
  - Lease & License Agreements
  - Competitive Procurement Contracts
  - Audits
  - Modifications to Service Contracts

**Purchasing Policies & Procedures**

We have prepared the policy site, in lay terminology, to help you to better understand the university's purchasing policies under fiscal autonomy. The most important points are explained here, and we are as handy as the nearest telephone if you need additional help.

**Guidelines for Work Related Employee Supplies and Services**

**FY11-PRC-001-01-Purchase of Goods**

**FY12-PRC-002-01-Purchase of Services**

**UMass Board of Trustees:**

- **UMass Procurement Policy**

Visit the State Ethics Commission at [http://www.state.ma.us/ethics/](http://www.state.ma.us/ethics/)

**BuyWays Production - access and job aids**

**BuyWays Frequently Asked Questions**

**PeopleSoft Finance 9.1**
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- To maximize vendor competition and volume discount purchases, departments must use Campus, University, State, or MHEC competitive procurement contracts 100% of the time for goods that are on contract. Contracts of other consortia and group purchasing organizations may also be utilized when approved by the University Purchasing Council.

- Departments must research the available University competitively bid procurement contracts regardless of dollar amount. If a department believes that an existing vendor contract does not meet its business requirement, they must document the justification for not using a contract vendor by submitting a No-Bid Justification Form. Documentation must be available for a post audit review.
Competitive Procurement Contracts

- **Campus contracts**, created by the UMass Boston Procurement Department for use by the Boston Campus;

- **University contract**, created by the UMass Purchasing Council for use by all six UMass campuses.

- **State Contract**, created by the Commonwealth of Massachusetts for use by all agencies of the Commonwealth of Massachusetts;

- **Massachusetts Higher Education Consortium Contracts (MHEC)**, is a purchasing consortium created for, and used by, most institutions of higher education in New England.

- **E&I Cooperative Services**, not-for-profit sourcing cooperative delivering services to the educational community.

*Note that a Campus or University contract should always take precedence over any similar contract that might be offered by any other contracting entity.*
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- **Campus Contracts**: Sodexo, Paul Revere Transportation and Follett Bookstore
- **University Contracts**:
  - **WB Mason - Office Supplies** (personal purchase program)
  - **Xerox – Copy Machines**
  - **Met Life Insurance – Faculty and Staff**
    University employees can participate in the U$ave purchasing program for personal computers. [https://www.umassp.edu/usave](https://www.umassp.edu/usave)
- **OSD State Contract**
  - State employee Verizon discount of 15%
  - **Poland Springs - #OSD-GRO26-0002**
    - Account Manager @ 774-406-6939 or Lisa.schmit@waters.nestle.com
- **Massachusetts Higher Education Consortium – MHEC**
  - Verizon 15%, AT & T 15%, Sprint 18% and T-Mobile 15% discounts
  - 400 vendors with contract pricing extended to faculty and staff.
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Purchasing Policy Dollar Limits:

**<$10,000 - Best practice and best value**
- Purchase from a contract vendor
- Purchase from a non-contract vendor requires documentation for future auditing purposes.

**>$10,000 - <$50,000**
- Purchase from a contract vendor, attach the written price quote to the requisition.
- Price quote must reference contract information.
- Purchase from a non-contract vendor, attach two written price quotes to the requisition.
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Purchasing Policy Dollar Limits continued:

>$50,000
- Purchase from a contract vendor, attach the written price quote to the requisition.
- Purchase from a non-contract vendor, forward specifications and to Procurement for public bidding.

>$10,000 - No Bid Justification
Examples: an item of equipment matches an existing item or the goods are unique and the vendor is the only one in the world from whom the product can be purchased.

Complete a No bid justification form, and a written price quote forward to Procurement.

All forms are located on the Contracts & Compliance Web site.
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BuyWays Showcased Vendors

• Mandatory usage of the Punch-out Catalog Vendors. Departments must use BuyWays Punch-out Catalog Vendors 100% of the time for goods that are available from the punch-out catalogs.
• The University Procurement Card (ProCard) may not be used to purchase goods that are available from Punch-out catalog Vendors.
• Punch-out Catalog Requisitions only: Procurement Department approval is not required for non-grant funded requisitions <$2,500.00.
• Department quality assurance post audit review for purchase orders that do not require Procurement Department approval.
• Procurement post audit review for purchase orders that do not require Procurement approval.
If the vendor has a contract you must select the *choose contract link* on the requisition to attach the contract.

A new window will appear with the appropriate contracts for this vendor. Based on your quote, select the appropriate contract. The contract number will be added to your requisition.
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Central Receiving

Goods purchased must be delivered to the Central Receiving Department. Some purchase orders require electronic receipt on the financial system entered by the Central Receiving Department.

*If vendor delivers the goods to the department, and the order requires electronic receipt, the department is responsible for notifying Central Receiving.*

Invoices

If a department receives an invoice, they are required to review, approve and forward to the Controller's Office immediately for payment processing. UMass Boston payment terms is net 30 days from the date of the invoice.

Purchase orders should be finalized (received, paid and liquidated if necessary) within 60 days of receipt or final acceptance.
Terms and Conditions of Purchases

The University’s standard terms and conditions for the purchase order such as: delivery, ship to and payment terms are located on the Procurement website under Forms.

Only authorized individuals listed on the University signature delegation have the authority to approve/sign any contract or agreement.

Individuals who enter into commitments or agreements without authorization may be personally liable for the obligations assumed under such agreements.

If purchase order is accompanied by a contract, lease, or purchase agreement (provided by the vendor) the contract must be reviewed and approved by the Director of Procurement or the Assistant Vice Chancellor for Contracts and Compliance and signed by the appropriate signatory.
Account Code:

- Identify the appropriate account code and commodity for the purchase.

The account code is the designation used in accounting for the types of goods and services for which UMass Boston funds are expended. The account code book is available on the Contracts and Compliance web site: http://www.umb.edu/administration_finance/contracts_compliance

Commodity:

- Identify the appropriate commodity code

The commodity name controls the tolerance level for invoicing, receiving requirements and the workflow approval for the requisition line item.
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Website Resources:

Purchase of Goods Policy

MHEC contract  www.mhec.net

State OSD Contracts:  https://www.commbuys.com

UMass Boston link to Shared Finance Applications
https://www.umasssp.edu/connect
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Please give us a call if you have any questions.
Procurement Main Line: 7-5060

Thank You!