Procurement Services

November 12, 2024

UCONN

Topics for Today's Discussion:

Why are We Here?

- Understanding the Procurement Process
  - Who Are We?
  - Definitions and Terminology
  - Procurement Tools
  - HuskyBuy
  - Bid Thresholds
  - Sole Sources
  - Resources

Questions, Comments, Feedback

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[Home | Purchasing Department (uconn.edu)](uconn.edu)

Procurement Teams

UBS Staff Directory | University Business Services (uconn.edu)

Professional & Specialized Services	Business Support Services	IT	Research	Facilities	Construction
Vacant Category Manager	Frank McCabe Category Manager	Elaine Dumas Category Manager	Kathleen Kearney Category Manager	Lisa Mieszkowicz Category Manager	Cesar Alonzo Category Manager
Terri Lessard Buyer II	Vacant Buyer II	Melanie Weed Buyer II	Dennis Sienna Buyer II	Shamona Kamm Buyer II	Griffin Fehrs Buyer II
Jenn Goodwin Buyer I	Sheneil Lawrence Buyer I	Jill Petrello Buyer I	Lupe Arroyo Buyer I	Kathleen Susca Buyer I	Christopher Peters Buyer I

Options for Procuring Goods or Services

When trying to purchase/procure an item or services

There are **two** options
1. *Husky Buy* – purchasing items through a catalog vendors and non-catalog vendors, want to utilize this process for any services rendered
2. *ProCard*- used when purchases cannot be made through Husky Buy, has a $4,999 per transaction limit

Each have their own rules and regulations

HuskyBuy

HuskyBuy | Purchasing Department (uconn.edu)

- What is HuskyBuy?
  - Procure to Pay system
  - Online shopping

Procurement Terminology

- **What is a Requisition?**
  - A formal request indicating vendors, types, quantities & prices for products or services a department needs to purchase

- **What is a Purchase Order?**
  - A legal offer to buy products or services issued by Procurement Services, indicating vendor, types, quantities, & agreed prices originating from a Requisition
  - A payment vehicle for products or services purchased under a Contract

- **What is a Purchase Order Amendment (POA)?**
  - A formal request to change a Purchase Order

- **What is RFx?**
  - Request for Information (RFI), Request for Proposal (RFP), Request for Quote (RFQ)

Define Procurement

Sourcing Identifying potential vendors for products or services and the mechanism to acquire them.

Contracting Memorializing business terms in a document that addresses common contingencies and that incorporates University and State contract requirements.

Purchasing The method of ordering and receiving goods and services including payment method (PO, PCard, DV).

Sourcing Thresholds for Purchases
Note: Applies to non-contract purchases

Threshold	Univ Accts & State Grant	Federal Grant
$0 - $24,999	MicroPurchase 1 quote (3 quotes preferred)	MicroPurchase 1 quote (3 quotes preferred)
$25,000 - $99,999	Informal Bid: 3 quotes	Informal Bid: 3 quotes
$100,000 - $249,999	Public Bid (Invitation to Bid or Request for Proposal)	Informal Bid: 3 quotes
$250K +	Same as $50K - $249,999	Public Bid: Request for Proposal

What Are The Purchasing Tools?

Type	What is it?	When should I use it?	What is the contract?
Free Standing Purchase Orders	• Non-catalogue transactions	• Purchase of Goods & Services • Preferred for general purchases	• PO Terms & Conditions • Other attachments to PO • Post PO documents
Purchase Orders with Executed Contract	• Catalogue (HuskyBuy) • Non-catalogue transactions	• Purchase of Goods & Services • Preferred for complex purchases • HuskyBuy is preferred method for ordering for all goods and services	• Executed contract/agreement • PO is just the payment vehicle
PCard	• Method of purchasing low $ value purchases from vendors that accept credit cards	• Purchase of low dollar transactions or if the items cannot be purchased through HuskyBuy	• Vendor quotes and terms • Purchases involving agreements should be processed on a requisition
Disbursement Vouchers *NOTE: Processed by AP*	• A payment mechanism for goods/services that <u>**have already**</u> been delivered to the University • Up to $2,500 per vendor per fiscal year	• When the use of HuskyBuy or PCard is not possible • E.g. – Payments to other universities, real estate payments, professional services, journals, periodicals, etc.	• Vendor quotes and terms • Any referenced documents

Board of Trustees (BOT) Thresholds for Purchases

$500,000.00 to $999,999.99: Reportable (can be reported following agreement execution and/or purchase order approval)

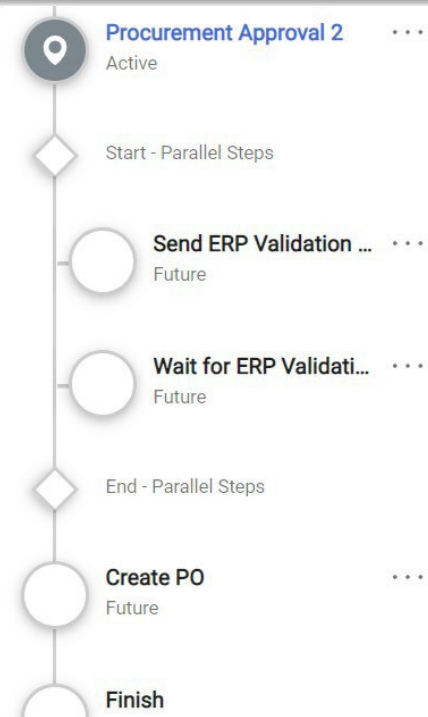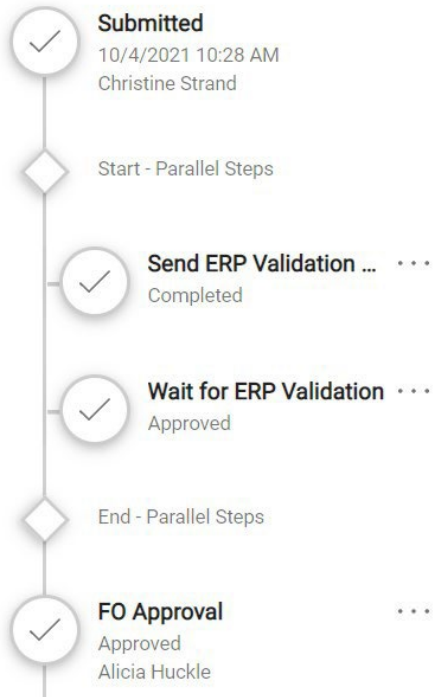$1,000,000.00 and over: Must be approved by the BOT prior to agreement execution and/or purchase order approval.

When Do You Need to Get A Quote/Bid?

Bid Prompt	Bid requirements
HuskyBuy Catalog Suppliers	• Not required • Contracted vendors
< $2500	• No Bid Required • Automatic Purchase Order (APO)
< $25k	• 1 signed quote required • Recommended to get 3 quotes
≥ $25 through < $100K	• Requires an informal bid process
≥$100K	• Requires a formal bid process that is publicly advertised *(federal grant threshold is $250K for formal bid)*

Preferred Method

Over $50k Needs Approval

Purchasing Support Required

Purchasing Procedure Flow for when using a Purchase Order

Know Your Sourcing
- HuskyBuy?
- < $25K
- Existing Contract
- Formal or informal Bid
- Sole Source

Get Bids/Quotes
- Get Quotes
- ≥ $25K You Need 3 Bids
- ≥ $100K formal process
- Decide On The Supplier

Requisition
- Requisition must be entered in HuskyBuy
- Department Level/ Fiscal Officer Approval

Purchase Order
- Requisition Is Reviewed By Procurement
- Assigned PO #
- If Using Grant funds then SPS Approval
- PO Is Sent To Supplier

Your Order is placed!!

Goods Are Received Or Services Are Performed

Supplier Submits Invoice
- PO # Referenced On Invoice
- Departmental Level Approval
- Then Payment is made!

Requisition Workflow in HuskyBuy

Sole Sources

What is a Sole Source?
- The item/service is only available from a single source

What is NOT a Sole Source?
- If you are purchasing from a supplier that has an established contract, the "sourcing" has already been performed
- An informal bid (3 quotes) for purchases up to $100K (or $250K for federal grant $)

What is NOT a legitimate sole source justification?
- Price
- Continuity of Services or Products (in some instances)
- "familiar with UConn"
- Top expert
- Existing Professional Relationship

Helpful Hints when Preparing for a Purchase

- **Is a CONTRACT in place or available to UConn?**
  - HuskyBuy Catalog Suppliers: orders below $50K often issue with no Procurement review
  - Established UConn, State of CT, or Consortia Contracts – contract# should be included on quote
- **Is the vendor in HuskyBuy***?* To register new supplier use HB "add supplier" option
- **How much is the purchase?** See Sourcing Threshold for required backup
- **Has vendor reviewed UConn's Terms & Conditions?**
  - Terms and Conditions | Contracting and Compliance (uconn.edu)
  - Is a PO terms amendment or a Contract / Agreement necessary?
- **Are Additional Forms Required with PR or DV ?**
  - (i.e. Sole Source, Quote, Invoice,   Software Survey, etc.)
  - Procurement Forms | Purchasing Department (uconn.edu)

Contracting

What are the benefits of having a contract?

- Fully and clearly defines a relationship
- Ensures delivery
- Ensures quality
- Provides recourse

How can I expedite purchases that may require a contract?

- Can your needs be met by a current contract?
- Speak with the appropriate Purchasing Agent for options
- **Think through your business terms and needs when going through the procurement process.**

Contracting Status Page

[Contract Status | Contracting and Compliance (uconn.edu)](uconn.edu)

NetID and password required

Contract Status Report

Search the Contract Status Report by vendor name. Status data is updated several times each week. **The report should not be shared.**

For a detailed explanation of the meaning of each status designation, view Steps in the Contracting Process.

Contracting Status Page

File Name	Purchasing/CPCA Number:	Date Open	Days Open	Current Status	Days In Current Status	Contract Specialist	Buyer
3D Systems	REQ # 153045127	03/07/2022	14	H - Drafting - 03/14/2022	7	Horn, Amy	Weed, Melanie
3Play Media, Inc.	UC-21-TL080921	11/22/2021	119	G - Business Discussions - 01/20/2022	60	Frank, Lisa	Lessard, Terri K
Ai-Media Technologies, LLC	UC-21-TL080921	11/22/2021	119	L - Vendor Review - 12/22/2021	89	Frank, Lisa	Lessard, Terri K
Air Temp - Family Studies AC Replacement	FO500112	01/01/2022	79	I - Buyer/Dept. Draft Review - 03/15/2022	6	Mayfield, Brock	Alonzo, Cesar
AKF Engineers OC Telecom 2021	007.1-1-NV-043024	05/26/2021	299	O - Incorporating Vendor Revisions - 08/24/2021	209	Mayfield, Brock	Dumas, Elaine
All Phase Enterprises, Inc. GC - Ext. Letter	OC-GC2019NV-2	02/21/2022	28	P - Vendor Execution - 03/08/2022	13	Jones, Sarah	Alonzo, Cesar
All State Construction Bio-Physics Cold Room	FO500067	02/01/2022	48	U - AG Review - 03/18/2022	3	Mayfield, Brock	Alonzo, Cesar
Alumni Longely West Residence Hall - AZ Corporatio	IT1312	03/17/2022	4	H - Drafting - 03/15/2022	6	Blake, Thomas	Alonzo, Cesar
Amenta Emma 2nd Contract OC Arch Small Pro 2018-22	009.1-2-NV-043021	08/31/2021	202	Q - Authorization Pending - 12/02/2021	109	Mayfield, Brock	Dumas, Elaine
American Red Cross Full Service Agreement	REQ # 151593033	12/27/2021	84	L - Vendor Review - 02/15/2022	34	Frank, Lisa	Lessard, Terri K
Anchor Engineering - 2nd Contract- OC Prof Civil		12/02/2021	109	P - Vendor Execution - 12/23/2021	88	Gagne, Abigail	Dumas, Elaine
Anthology, Inc. 8th Amendment	REQ # 146206896	01/03/2022	77	L - Vendor Review - 01/20/2022	60	Horn, Amy	Coleman, Katie
Anthony Travel WBB Italy Trip	KA 080122	02/24/2022	25	H - Drafting - 02/21/2022	28	Cote, Leslie	Allen, Kristin
Applied Research Associates, Inc. /JustICE Cont.	UC-180222	03/03/2022	18	L - Vendor Review - 03/02/2022	19	Horn, Amy	Coleman, Katie
Attain, LLC - Attain Rate and Space Tools	UC-20-KA080819-8A	01/06/2022	74	H - Drafting - 02/24/2022	25	Horn, Amy	Allen, Kristin
Automatic Sync Technologies	UC-21-Tl080921	11/22/2021	119	G - Business Discussions - 01/19/2022	61	Frank, Lisa	Lessard, Terri K
B & H Foto and Electronics Corp	RFP CSCU 1902	01/03/2022	77	G - Business Discussions - 02/03/2022	46	Horn, Amy	Paulraj, Kannan
Banton Construction Company - ELEC- Ext. Letter	OC.ELEC2019NV-1	02/21/2022	28	P - Vendor Execution - 03/11/2022	10	Jones, Sarah	Alonzo, Cesar
BD Carefusion Solutions, LLC - BD Pyxis	PR # 144472558	09/28/2021	174	L - Vendor Review - 02/25/2022	24	Horn, Amy	Kearney, Kathleen

ProCard – Thresholds for Purchases

Purchasing Card (ProCard) [Procurement Card | Purchasing Department (uconn.edu)](uconn.edu)
Single purchase value: < $4,999.99 Monthly limit: $10,000.00
Transactions per day: 20 # Transactions per month: 100
Exemptions may be granted on a case-by-case basis upon the approval of the Director of Procurement Services or his/her designee

ProCard – Thresholds for Purchases

Purchasing Card (ProCard)
All Merchants are assigned a Merchant Category Codes (MCC) that corresponds to their type of business (as established by the bank and encoded into the magnetic strip on the reverse side of the P-Card)
Travel and entertainment MCC's are blocked. The P-Card cannot be used for any travel related expenses.
For info on approved/restricted purchases: [Procurement Card User Manual - Section 1 | Purchasing Department (uconn.edu)](uconn.edu)

ProCard – Restricted Purchases

- Alcoholic beverages;
- Animals;
- Business, travel, and entertainment related expenses;
- Cash advances of any type;
- All phone and related monthly charges;
- All clothing (including for promotional use);
- Computers (any value, including, e.g., iPad, iPod, Netbooks, Nook, Kindle, and tablets);
- Construction and Renovation Services (includes anything that requires installation);
- Contract agreements of any type or value that involve a signature;
- EBay or any other auction website;
- Equipment (Valued over $4,999.00);
- Food & Beverages consumed at vendor's location (i.e., eating in at a restaurant or eating at an off campus location. Only take-out of food and non-alcoholic beverages are allowed);
- Furniture of any type;
- Gasoline (except for State vehicles);

Gifts/Donations (including flowers, gifts for life events, gifts for students, and milestones);
Gift Cards – MUST submit PCard Gift Card Preapproval form on HuskyBuy and receive prior approval;
Internet Service Providers;
Invoice Payments when payment method was not identified at the time of purchase (considered unauthorized);
- Items prohibited from purchase under grant or research contract;
- Leases & Lease – Purchases or any other time payment;
- Memberships (lifetime);
- Moving Services;
- Personal use items (i.e., attachés, folios, pen/pencil sets, etc.);
- Precious metals;
- Prescription drugs and controlled substances;
- Printing Services;
- Radioactive Materials;
- Rental of vehicles;
- Reimbursements of any type;
- Signage.

Unauthorized Purchases

What is an unauthorized purchase?

An unauthorized purchase is the purchase or commitment to purchase a good and/or service that has been received or performed prior to the issuance and approval of a purchase order. In this instance, approvals have not been properly obtained internally within the department or by Procurement.

• Compliance
• Auditing
•What is needed prior to the issuance of a purchase order for the supplier to be paid?

Purchasing Website

- [Home | Purchasing Department (uconn.edu)](http://uconn.edu)
  - Procurement Card
  - Commodities
  - Forms
  - HuskyBuy

- Help Desk 860-486-2289

Questions, comments and feedback….
What can we do better?

[Home | Purchasing Department (uconn.edu)](uconn.edu)

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