Welcome to State Procurement
Purchasing and Contracting at Stony Brook University

Presentations by:

Commodity Purchasing and Contracting – Karin Waslo, Purchasing Manager (2-6057)

Service Purchasing and Contracting – Mary LaCorte, Assistant Director (2-9849)
• Agenda
  • Purpose of State Procurement
  • General Procurement Requirements
  • Purchasing of Equipment, Supplies & Services
  • Purchasing Definitions
  • Non-Competitive Procurement
  • Types of Commodity Contracts & Commodity Assignments
  • Types of Service Contracts & Service Assignments
  • PO Number Alpha Suffixes
  • Summary and Questions
Purpose of State Procurement

State procurement’s purpose is to;

• **facilitate** each state agency’s mission while
• **protecting** the interests of the State and its taxpayers, and
• **promoting** fairness in contracting with the business community
State Procurement Goals

• Guard against favoritism, fraud, and corruption
• Ensure results meet agency’s needs at a fair price
• Protect interest of the State and its taxpayers
• Make a responsible effort to administer a process with maximum opportunities for vendors to compete, including Minority-owned, Woman-owned, and Serviced Disabled veteran-owned businesses.
Resources

- NYS Finance Law §163, §112, §165
- NYS Education Law
- NYS Codes, Rules, Regulations
- NYS Executive Law Article 15-A- MWBE
- NYS Economic Development Law
- OSC Guide to Financial Operations, DOB Budget Bulletins
- SUNY/SBU Policies and Procedures
- OGS Procurement Guidelines
- Executive Orders
Ask Yourself

• What do you want to purchase?
  - Commodity?
  - Service?
  - Technology Related (commodity + service)?

• What is the estimated cost?
  - Is it greater than or less than your Formal Competitive Bidding Limits? < $50,000)

• What process do you follow?
  - Competitive IFB (Low Bid)?
  - RFP (Best Value- Award based on other factors not only the price)
NYS Order of Procurement

1. NYS Preferred Sources
2. NYS Office of General Service’s Centralized Commodity Contracts
3. Consortia Contracts (a.k.a. Group Purchasing Organization contracts)
4. Agency procures on its own
NYS Preferred Source Commodities

1. Corcraft Products
2. IBNYS Industries for the Blind of New York State, Inc.
3. NYSID New York State Industries for the Disabled, Inc.
4. Department of Mental Health

Not subject to competitive procurement or advertising requirements
• General Procurement Requirements

  1. Documentation:
     - Detailed description of purchase and/or specification, scope of work (quantity, term of contract)
     - Copy of Vendor agreement or quote
     - Requisition or Service Request Form submitted in WolfMart
     - Vendor of choice or list of potential vendors
• General Procurement Requirements

1. Call Purchasing to see if a contract already exists for the service or commodity you are requesting.
   Staff available: Monday - Friday 8:00AM to 5PM

2. Do not sign any contract agreements or authorize work to be performed without approval from Procurement

3. Specifications and/or Scope of Work is the responsibility of the using department.
Purchasing of Equipment, Supplies and Services

- **Estimated Cost: $0 - $49,999.99**
- Order above $2500 require 3 Quotes or alternative proof of price reasonableness ([Price Justification](#))
- Estimated order time: 1-10 business days, excludes software. All software purchases require a lead time of at least two weeks and should be vetted with DoIT if implementation/integration is required. If SBU data will be stored on a third party’s server please add an additional 21 days for CISO review. *No competition required for purchases less than $2,500, but should ensure that prices are reasonable

- **Estimated Cost: $50,000.00 and above**
- Advertisement in NYS Contract Reporter for 15 business days or OSC approval of Contract Reporter Exemption Request if Single or Sole Source
- 3 Quotes or Formal bids ([Price Justification](#))
- Estimated order time: 45 to 120 business days for services, 15 – 120 business days for commodities.
Purchasing of Equipment, Supplies and Services

- Purchasing of supplies and equipment is different than purchasing services.
  - Commodities do not require A/G or OSC approval at any dollar threshold.
  - Service contracts require A/G and OSC approval presently at $50K. Work may not commence until OSC approval received.
• PURCHASING DEFINITIONS
  ➢ Sole Source Procurement
  ➢ Single Source Procurement
  ➢ Emergency Procurement
  ➢ Minority and Women's Business Enterprise (MWBE)
  ➢ Preferred Sources
  ➢ Invitation for Bids (IFB)
  ➢ Request for Proposals (RFP)
  ➢ Lobbying Law
  ➢ Split Orders
Non-Competitive Procurement

- Sole Source, Single Source and/or Proprietary Purchase
- Emergency Purchase (unanticipated purchase required to protect safety, life or property)
- Small Business, New York State Certified MWBEs
- Minority Sub-Contracting Goal
- Women Owned Sub-Contracting Goal
- Preferred Sources (right of first refusal)
- Centralized State Contracts

State purchase of requirements exceeding $50,000 without competitive bidding may be made under the situations listed only after approval is granted by the appropriate campus designee.
# Commodity Assignments

<table>
<thead>
<tr>
<th>Employee</th>
<th>Assignments</th>
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<tbody>
<tr>
<td>Karin Waslo- Section Manager (631) 632-6057</td>
<td>Stony Brook Foundation Funds, Major Equipment Purchases, Fuel Oil,</td>
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<tr>
<td>Maria Callegari (631) 632-4155</td>
<td>Appliances, Computer/IT Equipment, Communication Equipment,</td>
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<tr>
<td>Rebecca Kim (631) 632 9308</td>
<td>M/WBE Coordinator</td>
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<tr>
<td>Irene Wagner (631) 632-1087</td>
<td>Major Scientific/Laboratory Equipment, Construction Equipment/Supplies, Custodial Equipment/Supplies, Dental Equipment/supplies, Landscape Supplies, Road Salt, Plumbing Supplies</td>
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<tr>
<td>Donna Koos (631-632 4154</td>
<td>Expediter, Lapsing Funds processes</td>
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<tr>
<td>Employee</td>
<td>Assignments</td>
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<tr>
<td>Mary H La Corte</td>
<td>Contract Review, Major Agreements</td>
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<tr>
<td>Asst Director</td>
<td>(631) 632-9849</td>
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<tr>
<td>Fran Gandia</td>
<td>Service Contract Performance, Monitoring and Compliance</td>
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<tr>
<td>Service Contract Manager</td>
<td>(631) 632-9094</td>
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<tr>
<td>Dave Smith</td>
<td>Custodial/Building Maintenance, Grounds Maintenance, Construction/Rehab.,</td>
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<tr>
<td>(631) 632-9065</td>
<td>Landscaping, Towing, Skilled Labor, Lab Testing Services, HVAC Maintenance/Repair</td>
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<tr>
<td>Laura Beck</td>
<td>Refuse/Snow Removal, Hazardous Waste, Architect/Engineering Services, Road</td>
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<td>(631) 632-6229</td>
<td>Maintenance/Repair, CCTV Maintenance, Criminal Background, Utility Mark-out,</td>
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<td>Bus Services-Mail Services, Asbestos Abatement, Elevator Maintenance, Hazardous Waste, Leases, Air Monitoring Services</td>
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<tr>
<td>Deborah Marcus</td>
<td>Banking Services, Revenue/Affiliation, IT Services, Software Licensing,</td>
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<tr>
<td>(631) 632-6286</td>
<td>Cablevision Service, Equipment Maintenance/Repair, Architect/Engineering</td>
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<td>Services, Advertising, Construction/Rehab., Consultant Services, Supportive</td>
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<td>Labor, Card Access, Internet Service, Building Maintenance/Custodial,</td>
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<td>Contractual Temp Services, Student Health Insurance</td>
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<tr>
<td>Lynn A Davis</td>
<td>Cell Phone Services, Revenue Contracts, Printing, Spd Agreements, Student</td>
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<tr>
<td>(631) 632-2119</td>
<td>Search/Marketing Agreements, Maintenance Contracts, Printing, Copier</td>
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<td>Purchases</td>
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<tr>
<td>Malgorzata Remiszewski</td>
<td>Software agreements less than $250K, inventory services, miscellaneous</td>
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<tr>
<td>(631) 632-9836</td>
<td>services.</td>
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<tr>
<td>Marie D’Andrea</td>
<td>Moving Services, Construction/Rehab, Sharps Collection, Excavating Services,</td>
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<tr>
<td>(631) 632-6066</td>
<td>Film Badge Services, Irrigation System Maintenance, Maint Research,</td>
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<td>Architect/Engineering Services, Performing Artists</td>
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<td>John Mastromarino</td>
<td>Pest Control, Security Services, Equipment Maintenance, Special Events,</td>
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<tr>
<td>(631) 632-9779</td>
<td>Production Services, copy Machine Maint, Water Treatment, Cellular Telephone</td>
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<td>Services, Telecommunication, Drapery Cleaning/Repair, Fire 17’Extinguisher</td>
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<td>Maintenance, Cadaver Transportation/Cremation, Athletic Insurance</td>
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<td>Pat Miller</td>
<td>Cell phones, document destruction</td>
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<tr>
<td>(631) 632-4340</td>
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<tr>
<td>Myoshe Evans</td>
<td>Contracts Secretary</td>
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<tr>
<td>(631)632-4181</td>
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<tr>
<td>Jonathan Rios</td>
<td>Bid Coordinator</td>
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<tr>
<td>(631)632-9060</td>
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Requirements

- Reasonableness of Price
- Justification of Vendor
- Competition
- Ensure the procurement process produces the best possible product at a reasonable price
- Guard against favoritism, fraud, and collusion
Ask Yourself

- What is the estimated cost?
- Is your estimated cost greater than or less than your Formal Competitive Bidding Limits?
- What do you think your estimated annual cost will be?
- 12 Month Rule ($50,000)
State Finance Law

Discretionary Purchasing Threshold

Subdivision 6-b added to Section 163:

• Obligates state agencies to aggregate expected purchases for the same commodities or service within twelve months from the date of purchase to determine whether the procurement falls within the discretionary threshold.

• Expressly prohibits split ordering

• State that a change to or a renewal of a discretionary purchase shall not be permitted if the change or renewal would bring the aggregate amount of all purchases of the same commodities or services from the same provider within the twelve month period over the discretionary threshold and should have been reasonably expected prior to the date of the first purchase.
Avoid Pitfalls

- Get the most from your purchases
- Be specific
- Monitoring
- Do your homework
- OGS or Less
- Talk to everyone – don’t reinvent the wheel
Don’t forget Procurement Staff are always available to assist you Monday through Friday from 8:00AM to 5:00PM.

Please do not hesitate to contact us.
Questions?

Thank You