Welcome to State Procurement
Purchasing and Contracting at Stony Brook University

Presentations by:

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

Service and Construction 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 or less than SUNY’s Advertising threshold and/or Formal Competitive Bidding Limits > $125,000?

• 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 Services’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. Industries for the Blind
• 3. 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 - $50,000**
  - Statement of reasonableness of price required (Price Justification) and justify vendor selection
  - Estimated order time: 1-10 days

- **Estimated Cost: $50,000.01 - $125,000**
  - Advertise in NYS Contract Reporter (15 business days)
  - Solicit 3 informal quotes, and
  - Statement of reasonableness of price (Price Justification)
  - Estimated order time: 45 to 120 days
Purchasing of Equipment, Supplies and Services

- Estimated Cost: $125,000.01 - $250,000
  - Advertise in New York State Contract Reporter (15 business days)
  - Minimum of 5 sealed formal bids solicited by Purchasing
  - Estimated order time: 45 to 120 days

- Estimated Cost: $250,000.01 and over
  - Advertise in NYS Contract Reporter
  - Prior approval of OSC for Service contracts (not commodities or construction)
  - Estimated order time: 60 to 120+ days
  - Minimum of 5 sealed formal bids solicited by Purchasing
  - Do not commence work until receive OSC approval
• 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>(631) 632-6057</td>
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</tr>
<tr>
<td>(631) 632-6059</td>
<td></td>
</tr>
<tr>
<td>Michele Rindos</td>
<td>Appliances, Computer/IT Equipment, Communication Equipment, Scientific Equipment, Security Systems,</td>
</tr>
<tr>
<td>(631) 632-6071</td>
<td></td>
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<tr>
<td>Maria Callegari</td>
<td>M/WBE Program Coordinator</td>
</tr>
<tr>
<td>(631) 632-4155</td>
<td></td>
</tr>
<tr>
<td>Rebecca Kim</td>
<td>Major Scientific/Laboratory Equipment, Construction Equipment/Supplies, Custodial Equipment/Supplies, Dental Equipment/supplies, Landscape Supplies, Road Salt, Plumbing Supplies, University Police/Fire Safety</td>
</tr>
<tr>
<td>(631) 632 9308</td>
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<tr>
<td>Irene Wagner</td>
<td>Expediter, Lapsing Funds processes</td>
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<tr>
<td>(631) 632-1087</td>
<td></td>
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<tr>
<td>Donna Koos</td>
<td></td>
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<tr>
<td>(631-632 4154</td>
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<tr>
<td>Employee</td>
<td>Assignments</td>
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<tr>
<td>Mary H La Corte Asst Director (631) 632-9849</td>
<td>Contract Review, Major Agreements</td>
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<tr>
<td>Fran Gandia Service Contract Manager (631) 632-9094</td>
<td>Service Contract Performance, Monitoring and Compliance, Cell phones, document destruction</td>
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<tr>
<td>Dave Smith (631) 632-9065</td>
<td>Custodial/Building Maintenance, Grounds Maintenance, Construction/Rehab., Landscaping, Towing, Skilled Labor, Lab Testing Services, HVAC Maintenance/Repair</td>
</tr>
<tr>
<td>Lynn A Davis (631) 632-2119</td>
<td>Cell Phone Services, Revenue Contracts, Printing, Spd Agreements, Student Search/Marketing Agreements, Maintenance Contracts, Printing, Copier Purchases</td>
</tr>
<tr>
<td>Malgorzata Remiszewski (631) 632-9836</td>
<td>Software agreements less than $250K, inventory services, miscellaneous services.</td>
</tr>
<tr>
<td>Marie D'Andrea (631) 632-6066</td>
<td>Moving Services, Construction/Rehab, Sharps Collection, Excavating Services, Film Badge Services, Irrigation System Maintenance, Maint Research, Architect/Engineering Services, Performing Artists</td>
</tr>
<tr>
<td>John Mastromarino (631) 632-9779</td>
<td>Pest Control, Security Services, Equipment Maintenance, Special Events, Production Services, copy Machine Maint, Water Treatment, Cellular Telephone Services, Telecommunication, Drapery Cleaning/Repair, Fire Extinguisher Maintenance, Cadaver Transportation/Cremation, Athletic Insurance</td>
</tr>
<tr>
<td>Myoshe Evans (631) 632-4181</td>
<td>Contracts Secretary</td>
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<tr>
<td>Jonathan Bloom</td>
<td>BJ Sullivan</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? Advertising required if over $50,000.
- Is your estimated cost greater than or less than SUNY’s Formal Competitive Bidding Limits of over $125,000?
- What do you think your estimated annual cost will be?
- 12 Month Rule: if over $50,000 for same commodity or service need advertising and quotes.
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

• States 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