Welcome TO
Research Foundation Training

FALL 2017
Research Foundation
Purchasing

Presented by

Edith Koelln
RF Purchasing Manager
Research Foundation Purchasing

Agenda

- General Procurement Requirements
- Special Approvals
- Purchasing of Equipment Supplies & Services
- Non-Competitive Procurement
- Recommended Licensed Vendors for Promotional Items
- Commodity Assignments
- Summary and Questions
General Procurement Requirements

Procurement required Documentation:

- Detailed description and specification
- WolfMart Requisition completed with suggested supplier and appropriate authorizations
  - Sponsored funds must be approved by OGM (Office of Grants Management)
  - IDC (Indirect Cost) funds can be submitted directly to the Procurement Office for processing
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General Procurement Requirements

➢ We are available Monday through Friday
➢ 8:00 am to 5:00 pm to assist you
➢ Do not sign any contract agreements or authorize work to be performed without approval from Procurement
➢ Technical information is the responsibility of the using department, not Procurement
Special Approvals

- All Radioactive materials that are coming to campus must have approval by a Radiation Safety Officer (RSO) in the Environmental Health and Safety Office (EHS) 2-9676.

- IDC or Royalty funded Travel (any amount) and equipment purchases of $5,000.00 or above per the Presidents Reduction Plan must have written approval (signature) by the appropriate Dean or VP.
Special Approvals

The End User is responsible to obtain the approval from the specific area and have written approval attached to the requisition when submitting to procurement for processing for the following purchases:

Auxiliary Heating/Cooling Equipment – Electric Fans/Air Purifiers/Dehumidifiers/Heaters/Heating Pads and Air Conditioners require approval through the Energy Management Department. Contact name for any questions – Thomas Lanzilotta. Department must apply for approval through the following link:

https://docs.google.com/a/stonybrook.edu/forms/d/e/1FAIpQLScqjCtO0XMCMwTrosotA5DFqDq2xvu5lbyZ7qCKkpbfZC6dDXQ/viewform
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Special Approvals – Cont’d

- Locks/Security Systems: must be approved by Donald Coleman, 2-6407

- Motorola Radios: must be approved by the Emergency Management Office, 2-6350

- Printing: must be approved by Advertising Department contact Sue Walsh. *Please note that all requests for Advertising must go through the Advertising Department contact Sue Walsh, 2-6459
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- **Purchasing of Equipment, Supplies and Services**

  **Estimated Cost: $0.01 - $50,000.00**
  Discretionary purchasing without formal competition, requires some form of cost or price analysis/reasonableness of price.
  
  **Estimated Cost: $50,000 - $100,000**
  - Procurement requires (3) three written quotes (Department must go with the lowest priced quote), or a Single/Sole Source Documentation Form along with a detailed justification.
  - If item(s) are on a New York State Contract or are specified in the award from the sponsor (Procurement requires a copy of the page of award where item(s) and vendor are specified)
  - Estimated order time: 1-5 days
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- Purchasing of Equipment, Supplies and Services
  - Estimated Cost: over $100,000
    - Same as above
    - Some form of cost or price analysis must be made and documented in the procurement files for all purchases. Price analysis may be accomplished in various ways including the comparison of price quotations submitted, market prices, or similar assessments.
    - “Sealed Bids or Proposals”. Please refer to our webpage for details.
    - [http://www.stonybrook.edu/procurement/employees/purchasing/researchprocurement.shtml](http://www.stonybrook.edu/procurement/employees/purchasing/researchprocurement.shtml)
  - Estimated order time: 1-5 days (if a sealed bid is required the order time could take as long as 2-3 months)
Purchasing of Equipment, Supplies and Services

RF PO Terms and Conditions which include Insurance requirements for contractors performing services for the RF refer to the following link:

Purchasing of Equipment, Supplies and Services

The competitive bid process or the Single/Sole Source justification related to procurement is limited to the period defined by the agreement with the vendor including any agreed-upon extensions or options for extensions or renewals. If a change to a renewal, extension, or continuation of a procurement that was not competitively bid would result is an actual aggregate expenditure that exceeds the thresholds for required solicitation of bids, it must be approved by an RF Officer or operations manager after a Single/Sole Source justification documenting that the failure to determine the reasonably expected aggregate amount on the date of initial purchase was reasonable and justified.
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**Non-Competitive Procurement**

- Research purchases exceeding $50,000.00 without competitive bidding may be made under items #1 or 2. If purchase is made as a Single/Sole Source procurement it can be made only after approval is granted by the appropriate campus designee.

  1. Purchases made under contracts with the State of New York, Consortiums, or through Campus Stores Operations or Service Centers.

  2. Purchases up to $200,000 from New York State certified small, minority, or women-owned businesses.

  3. Purchases that qualify as a Sole Source procurement because the product or service procured is unique to one source or the requirements for the product or service can only be met by one supplier or contractor.

  4. Purchases that qualify as Single Source procurement because of limited circumstances that justify procurement without open competition.
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- **Non-Competitive Procurement**

  **Documentation Requirements for Single/Sole Source Procurements**

  All Single or Sole Source procurements require documentation of solicitation elements that includes a clear and accurate description of the technical and programmatic requirements for the material, product or services being procured. The Single/Sole Source Form must be used to document all single or sole source procurements prior to the date of the initial purchase.

  Some form of cost or price analysis must be made and documented in the procurement files for all purchases. Price analysis may be accomplished in various ways including the comparison of price quotations submitted, market prices, or similar assessments.
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- Recommended Licensed Vendors for promotional items
- [http://www.stonybrook.edu/sb/toolkit/vendors.html](http://www.stonybrook.edu/sb/toolkit/vendors.html)
# Research Foundation Purchasing

## Research Commodity Assignments

<table>
<thead>
<tr>
<th>Staff</th>
<th>Assignments</th>
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<tbody>
<tr>
<td>Edith Koelln, Section Manager</td>
<td>Large Dollar Medical, Dental and Scientific Equipment, Subcontracts, Office Temps</td>
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<tr>
<td>(631) 632-6068</td>
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</tr>
<tr>
<td>Janet Rienzo Stack, Buyer</td>
<td>Chemicals, Radioactive, Gases</td>
</tr>
<tr>
<td>(631) 632-6092</td>
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<tr>
<td>(631) 632-6056</td>
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<tr>
<td>Nancy DiPol, Buyer</td>
<td>Medical/ Dental &amp; Scientific Equipment &amp; Supplies, Film, Maritime Supplies, Heaters, Fans, Domestic Refrigerators, Appliances, Landscaping, Repairs, Live Animals Non-Vertebrae, Plumbing, Tubing</td>
</tr>
<tr>
<td>(631) 632-6069</td>
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<tr>
<td>Sherrell Cordova, Buyer</td>
<td>Small Dollar Scientific Supplies, Flags &amp; Banners, Office Supplies &amp; Equipment, Registration &amp; Booth Rentals, Promotional items, Janitorial, Hospitality Supplies</td>
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<tr>
<td>(631) 632-7065</td>
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Summary

Please remember that the more information you give us the better able we are to process your requests.

Don’t forget Procurement Staff are always available to assist you Monday through Friday from 8:00 AM to 5:00 PM.

Please do not hesitate to contact us.
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QUESTIONS?

Thank You