

Procurement Quick Reference Guide (updated 1/1/19)

Procurement Rules
<ul style="list-style-type: none">• All purchases of services, materials and supplies shall be made by or at the direction of the Department of Procurement, Disbursement and Contract Services (PDCS), regardless of source of funds.• All purchases must be made in accordance with• University Policies and Procedures<ul style="list-style-type: none">○ Board of Trustee Regulations○ Internal Governing Policies○ University Process Guide• Procurement Rules of the Chief Procurement Officer for Public Institutions of Higher Education (44 Ill Admin. Code 4)• Illinois Procurement Code (30 ILCS 500)• All State and Federal Laws
Purchasing Methods
<ul style="list-style-type: none">• P-Card Purchases• Request for Payments• On-campus Charges/Journal Entries• Requisitions
Request for Payments
<ul style="list-style-type: none">• To be used for the following:<ul style="list-style-type: none">○ Subscriptions○ Membership dues (include start & end dates)○ Registration fees○ Conference fees○ Prepayments (contact PDCS <u>prior</u> to prepayment)○ Reimbursements to employees<ul style="list-style-type: none">▪ Membership dues/registration fees▪ Up to \$200.00 for supplies etc.
On-campus Charges/Journal Entries
<ul style="list-style-type: none">• Used for:<ul style="list-style-type: none">○ Office supplies from Prime Vendor (Office Depot)○ Small Package Delivery Service (UPS)○ Copier Charges (Konica Minolta)○ Internal University Services (Bookstore, Daily Eastern News, Facilities, Planning and Management Charges, Mail Services, Media Services, Panther Catering, Panther Print and Copy Center, Telecommunications, etc...)
Requisitions
<ul style="list-style-type: none">• Used for purchases where P-Card cannot be used• <u>Goods cannot be ordered and Services cannot begin until there is a contract and/or purchase order signed by PDCS</u>• Procurement, Disbursements & Contract Services (PDCS) executes solicitation and places the order with the vendor• PDCS responsible for follow-up and/or change orders– contact Buyer with problems and/or changes
Requisition Process
<ul style="list-style-type: none">• Department creates Requisition in Banner (if approved by Financial Manager and funds are available)<ul style="list-style-type: none">○ Detailed description required (item, service, quantity, date, time, etc..)○ Allow sufficient time for drafting the solicitation and the solicitation process• Department submits specifications/backup documentation to PDCS• Requisition is assigned to Buyer if approved
Specifications
<ul style="list-style-type: none">• Specifications must be accurate and detailed enough to get what you want but not too detailed that competition is limited or restricted<ul style="list-style-type: none">○ If quantity changes or specifications change, the solicitation may need to be modified or re-bid• The Vendor's quote cannot be submitted to PDCS as the specifications• If the Vendor writes the specifications, by law, they cannot bid

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Solicitation Process
<ul style="list-style-type: none"> • Buyer makes determination as to which solicitation process to follow and creates the solicitation document <ul style="list-style-type: none"> ○ Buyer's decision on which solicitation process to follow based upon: <ul style="list-style-type: none"> ▪ Dollar amount of requisition ▪ Item or service being requested ▪ Is there a Prime Vendor contract currently in place? ▪ The rules and regulations that the Buyer is required to follow • Buyer seeks appropriate approval prior to solicitation and prior to award, if required • Buyer executes solicitation and manages the solicitation process • Buyer negotiates and finalizes contract and/or issues Purchase Order
Small Purchase Thresholds (8/9/17)
<ul style="list-style-type: none"> • Supplies & Services – \$100,000 • Professional & Artistic Services - \$100,000 • Construction projects - \$100,000 • Architects & Engineers (QBS) - <\$25,000
Types of Solicitations
<ul style="list-style-type: none"> • Under small purchase threshold <ul style="list-style-type: none"> ○ Request for Quote (RFQ) • Near or exceeding the small purchase threshold <ul style="list-style-type: none"> ○ Invitation for Bid (IFB) ○ Request for Proposal (RFP) ○ Sole Source Purchase ○ Quality Based Selection (QBS)
Procurement Bulletin For Higher Education
<ul style="list-style-type: none"> • Procurements near or exceeding the small purchase threshold are solicited on the Procurement Bulletin for Higher Education • Advertised on the Procurement Bulletin a minimum of 15 days <ul style="list-style-type: none"> ○ Must be reviewed prior to advertising by: <ul style="list-style-type: none"> ▪ Procurement Compliance Monitor (PCM) ▪ State Purchasing Officer (SPO) • Award approval can take up to 30 days <ul style="list-style-type: none"> ○ Final award must be approved by: <ul style="list-style-type: none"> ▪ Procurement Compliance Monitor (PCM) ▪ State Purchasing Officer (SPO) ▪ Procurement Policy Board (PPB)
Administrative Approvals
<ul style="list-style-type: none"> • Before an order is placed – the following approvals are required: <ul style="list-style-type: none"> ○ <u>PRIOR</u> to Requisition/P-Card: Obtained by Department <ul style="list-style-type: none"> ▪ All Equipment – Vice President, & Financial Manager, Dean or Director ○ <u>PRIOR</u> to Purchase Order: Obtained by Procurement <ul style="list-style-type: none"> ▪ \$25,000 or more – Vice President ▪ \$100,000 or more – President ▪ \$250,000 or more – Board of Trustees
Contracts/Purchase Orders
<ul style="list-style-type: none"> • Contracts <ul style="list-style-type: none"> ○ AIA documents- Must have three original contracts for signature ○ All contracts shall be issued in the name of Board of Trustees of Eastern Illinois University and sent to Business Office except for student housing contracts ○ Must have a start date and end date listed in the contract ○ Must be signed by the Financial Manager <u>and</u> Vendor before PDCS will sign • Purchase Orders <ul style="list-style-type: none"> ○ Not fully executed until signed by PDCS ○ Must be fully executed <u>prior</u> to the start of service ○ Cannot cross over fiscal years, unless it is grant funded • Invoices <ul style="list-style-type: none"> ○ Any invoices must be dated and submitted after work is completed • Change orders <ul style="list-style-type: none"> ○ To be executed through PDCS

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Internal Governing Policies related to Procurement	
• 103- Computers, Servers, and Software	• 111- Travel
• 104- Contract/Agreement Review, Approval, Signature	• 112- Travel Advances, Student Group Travel
• 105- Printing	• 113- Business Expense Reimbursement for Food Purchases
• 106- Product Demonstrations	• 114- Business Expenses
• 108- Purchasing	• 115- Interview Expense Payments
• 109- Purchase of Flowers and Gifts	• 149- Alcoholic Beverages, Payment from University Accounts
• 110- University Vehicles	• 163- University Personal Property Control
Prime Vendor Contracts (*=IPHEC)	
Search for additional awards under www.IPHEC.org under opportunities/awards.	
• Allsteel/HON (Office Furniture*)	• Kimball International (Office Furniture*)
• Apple Inc. (Apple Products, Software, Maintenance*)	• Knoll (Classroom Furniture*)
• Applied Industrial Technology (Maintenance, Repair & Operating Supplies*)	• Konica Minolta (Copy Machines)
• Beckman Coulter (Lab Supplies, Services, Maintenance*)	• Krueger International "KI" (Classroom Furniture*)
• Bio Corporation (Life Science Catalog*)	• Medline Industries (Medical Surgical Products & Equipment*/Vaccines, Antibiotics, OTC & Pharm Products*)
• CDW-Government Inc. (Computer Hardware*/Computer Peripherals*/Networking Equipment & Service*/Cloud Storage*)	• Midwest Computer Products (Audio Visual*/Audio Visual Integration-primary*)
• Chemglass Life Science (Life Science Catalog*)	• Mity Lite (Mobile/Portable Event Furniture*)
• CIM Technology Solutions (Audio Visual*)	• Office Depot (Office Supplies*)
• Claridge Products & Equipment (Visual Display & Training Aids*)	• Pepsi MidAmerica (Beverage Services)
• Conference Technologies (Audio Visual*)	• Santa Cruz Biotechnology (Life Science Catalog*)
• Corporate Travel Planners (Travel Booking Tool*)	• Sigma-Aldrich (Life Science Catalog*)
• CV Lloyde (Audio Visual*)	• Sherwin Williams (Paint*)
• Dell (Computing Hardware and Related Services*)	• SJB Promotions, Inc. (Advertising & Marketing Products *)
• EAN Services DBA Enterprise (Car Rental*)	• SKC Communications Products (Audiovisual & Collaboration Integrator*)
• Ferguson Enterprises Inc. (Plumbing Supplies*)	• Steelcase (Premium Office Furniture*)
• Grainger (Maintenance, Repair & Operating Supplies*)	• Supplyworks (Janitorial*)
• Gordon Food Service (Food*)	• The Mohawk Group (Carpet*)
• Haworth (Office Furniture*)	• UPS (Small Package Transportation*)
• HD Supply Facilities Maintenance (Maintenance, Repair & Operating Supplies*)	• WESCO (Electrical Supplies*)

Contact PDCS for more information.

- If requisition estimate is close to the small purchase threshold, PDCS will likely put out as a sealed solicitation.
- PDCS strives to expedite all orders; however, mandated rules and regulations may slow the process so plan accordingly.
- PDCS strives to procure quality goods and services at the lowest price available.