## Procurement Rules

- 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
    - 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

- P-Card Purchases
- Request for Payments
- On-campus Charges/Journal Entries
- Requisitions

## Request for Payments

- To be used for the following:
  - Subscriptions
  - Membership dues (include start & end dates)
  - Registration fees
  - Conference fees
  - Prepayments (contact PDCS prior to prepayment)
  - Reimbursements to employees
    - Membership dues/registration fees
    - Up to $200.00 for supplies etc.

## On-campus Charges/Journal Entries

- Used for:
  - 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

- Used for purchases where P-Card cannot be used
- Goods cannot be ordered and Services cannot begin until there is a contract and/or purchase order signed by PDCS
- 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

- Department creates Requisition in Banner (if approved by Financial Manager and funds are available)
  - 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

- Specifications must be accurate and detailed enough to get what you want but not too detailed that competition is limited or restricted
  - 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
## Solicitation Process
- Buyer makes determination as to which solicitation process to follow and creates the solicitation document
  - Buyer’s decision on which solicitation process to follow based upon:
    - 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)
- Supplies & Services – $100,000
- Professional & Artistic Services - $100,000
- Construction projects - $100,000
- Architects & Engineers (QBS) - <$25,000

## Types of Solicitations
- Under small purchase threshold
  - Request for Quote (RFQ)
- Near or exceeding the small purchase threshold
  - Invitation for Bid (IFB)
  - Request for Proposal (RFP)
  - Sole Source Purchase
  - Quality Based Selection (QBS)

## Procurement Bulletin For Higher Education
- 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
  - Must be reviewed prior to advertising by:
    - Procurement Compliance Monitor (PCM)
    - State Purchasing Officer (SPO)
- Award approval can take up to 30 days
  - Final award must be approved by:
    - Procurement Compliance Monitor (PCM)
    - State Purchasing Officer (SPO)
    - Procurement Policy Board (PPB)

## Administrative Approvals
- Before an order is placed – the following approvals are required:
  - PRIOR to Requisition/P-Card: Obtained by Department
    - All Equipment – Vice President, & Financial Manager, Dean or Director
  - PRIOR to Purchase Order: Obtained by Procurement
    - $25,000 or more – Vice President
    - $100,000 or more – President
    - $250,000 or more – Board of Trustees

## Contracts/Purchase Orders
- Contracts
  - 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 and Vendor before PDCS will sign
- Purchase Orders
  - Not fully executed until signed by PDCS
  - Must be fully executed prior to the start of service
  - Cannot cross over fiscal years, unless it is grant funded
- Invoices
  - Any invoices must be dated and submitted after work is completed
- Change orders
  - To be executed through PDCS
## Internal Governing Policies related to Procurement

<table>
<thead>
<tr>
<th>103- Computers, Servers, and Software</th>
<th>111- Travel</th>
</tr>
</thead>
<tbody>
<tr>
<td>104- Contract/Agreement Review, Approval, Signature</td>
<td>112- Travel Advances, Student Group Travel</td>
</tr>
<tr>
<td>105- Printing</td>
<td>113- Business Expense Reimbursement for Food Purchases</td>
</tr>
<tr>
<td>106- Product Demonstrations</td>
<td>114- Business Expenses</td>
</tr>
<tr>
<td>108- Purchasing</td>
<td>115- Interview Expense Payments</td>
</tr>
<tr>
<td>109- Purchase of Flowers and Gifts</td>
<td>116- University Personal Property Control</td>
</tr>
<tr>
<td>110- University Vehicles</td>
<td>149- Alcoholic Beverages, Payment from University Accounts</td>
</tr>
</tbody>
</table>

### Prime Vendor Contracts (*=IPHEC)

Search for additional awards under [www.IPHEC.org](http://www.IPHEC.org) under opportunities/awards.

<table>
<thead>
<tr>
<th>Allsteel/HON (Office Furniture*)</th>
<th>Kimball International (Office Furniture*)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Apple Inc. (Apple Products, Software, Maintenance*)</td>
<td>Knoll (Classroom Furniture*)</td>
</tr>
<tr>
<td>Applied Industrial Technology (Maintenance, Repair &amp; Operating Supplies*)</td>
<td>Konica Minolta (Copy Machines)</td>
</tr>
<tr>
<td>Beckman Coulter (Lab Supplies, Services, Maintenance*)</td>
<td>Krueger International “Ki” (Classroom Furniture*)</td>
</tr>
<tr>
<td>Bio Corporation (Life Science Catalog*)</td>
<td>Medline Industries (Medical Surgical Products &amp; Equipment*/Vaccines, Antibiotics, OTC &amp; Pharm Products*)</td>
</tr>
<tr>
<td>CDW-Government Inc. (Computer Hardware*/Computer Peripherals*/Networking Equipment &amp; Service*/Cloud Storage*)</td>
<td>Midwest Computer Products (Audio Visual*/Audio Visual Integration—primary*)</td>
</tr>
<tr>
<td>Chemglass Life Science (Life Science Catalog*)</td>
<td>Mity Lite (Mobile/Portable Event Furniture*)</td>
</tr>
<tr>
<td>CIM Technology Solutions (Audio Visual*)</td>
<td>Office Depot (Office Supplies*)</td>
</tr>
<tr>
<td>Claridge Products &amp; Equipment (Visual Display &amp; Training Aids*)</td>
<td>Pepsi Midamerica (Beverage Services)</td>
</tr>
<tr>
<td>Conference Technologies (Audio Visual*)</td>
<td>Santa Cruz Biotechnology (Life Science Catalog*)</td>
</tr>
<tr>
<td>Corporate Travel Planners (Travel Booking Tool*)</td>
<td>Sigma-Aldrich (Life Science Catalog*)</td>
</tr>
<tr>
<td>CV Lloyd (Audio Visual*)</td>
<td>Sherwin Williams (Paint*)</td>
</tr>
<tr>
<td>Dell (Computing Hardware and Related Services*)</td>
<td>SJB Promotions, Inc. (Advertising &amp; Marketing Products *)</td>
</tr>
<tr>
<td>EAN Services DBA Enterprise (Car Rental*)</td>
<td>SKC Communications Products (Audiovisual &amp; Collaboration Integrator*)</td>
</tr>
<tr>
<td>Ferguson Enterprises Inc. (Plumbing Supplies*)</td>
<td>Steelcase (Premium Office Furniture*)</td>
</tr>
<tr>
<td>Grainger (Maintenance, Repair &amp; Operating Supplies*)</td>
<td>Supplyworks (Janitorial*)</td>
</tr>
<tr>
<td>Gordon Food Service (Food*)</td>
<td>The Mohawk Group (Carpet*)</td>
</tr>
<tr>
<td>Haworth (Office Furniture*)</td>
<td>UPS (Small Package Transportation*)</td>
</tr>
<tr>
<td>HD Supply Facilities Maintenance (Maintenance, Repair &amp; Operating Supplies*)</td>
<td>WESCO (Electrical Supplies*)</td>
</tr>
</tbody>
</table>

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.