



## FINANCIAL AFFAIRS PROCUREMENT GUIDELINES – FY 2018

These guidelines apply to all purchases, including operating, capital, grants and NYIT credit card transactions. All schools and departments on the Old Westbury and Manhattan campuses and any U.S. off-site locations shall adhere to these guidelines.

References to the forms in this document which are highlighted in **red** are available at the following link:  
[https://www.nyit.edu/administrative\\_offices/procurement\\_services](https://www.nyit.edu/administrative_offices/procurement_services)

NYIT Purchase Order General Terms and Conditions are available at the following link:  
[file:///C:/Users/garms/AppData/Local/Microsoft/Windows/INetCache/IE/04I0SMYY/NYIT\\_PurchaseOrderTermsConditions.pdf](file:///C:/Users/garms/AppData/Local/Microsoft/Windows/INetCache/IE/04I0SMYY/NYIT_PurchaseOrderTermsConditions.pdf)

### 1. REQUIREMENTS

**Requirements \$5K and above require a minimum of three (3) written competitive bids** unless a single-source or sole-source justification is submitted. Please see form for **Justification for Sole or Single Source Purchase** (*note that the Procurement Director must approve the Justification for Sole or Single Source Purchase form prior to the purchase*)

#### **Bid vs Request for Proposal (RFP): what's the difference?**

- **Bid** = Rigid request with defined scope of work; parameters are finite and award is based solely on lowest responsive, responsible bid.
- **RFP** = flexible request with complex requirements that cannot be judged based solely on price. Vendor qualifications, experience and references are among the criteria used to determine award.  
**RFP Scoring Matrix**

Keep in mind that it is neither ethical nor appropriate to divulge one vendor's pricing information (bid, discount, etc.) to another in the interest of obtaining a better price. All vendors must have fair and equal access to NYIT business.

Regardless of how the vendor is selected, a Purchase Order (PO) number or NYIT Procurement Card (P-Card) number **must** be provided when an order is placed. A Purchase Order is a legally binding document issued by NYIT to a vendor that authorizes the vendor to provide goods or services. The PO defines items, quantities, pricing and delivery information. **NOTE:** Invoices from vendors for purchases made **without an NYIT PO are subject to non-payment by NYIT.**

### 2. REQUISITIONING INFORMATION

Enter a requisition in Oracle and attach supporting documentation.

Supporting documentation includes the following:

- Standard Purchases: the vendor-supplied quotation
- Requisitions totaling \$5,000 and above: the **Bid Summary Sheet** and associated bids OR the **Justification for Sole or Single Source Purchases**
- Registration Fees and Dues: the invoice
- Contract or Agreement copy (fully executed)

### Special commodities

**Chemicals:** a **Purchase Requisition of Chemicals (PRC) Form** and the vendor quote. Note: Forward a copy of the PRC, Material Safety Data Sheets (MSDS), and the requisition number to Brian Kelleher at [bkellehe@nyit.edu](mailto:bkellehe@nyit.edu).

**Technology Equipment:** Consult with Information Technology Services ([iomar@nyit.edu](mailto:iomar@nyit.edu) or [ewong@nyit.edu](mailto:ewong@nyit.edu)) for information and specifications for IT-related purchases. **Note: Technology equipment may not be purchased with the NYIT P-Card.**

### New Vendors

Please do not enter requisitions to vendors or individuals who are not in the database! A completed **Vendor Set Up Packet** must be completed and forwarded to [nyitprocurement@nyit.edu](mailto:nyitprocurement@nyit.edu) **before** the requisition is entered.

**NOTE:** Requests for Amazon, eBay and PayPal purchases must be submitted to Procurement Services; please see item 5, "**Request for Purchase by Credit Card**" below.

## 3. CONTRACTS AND AGREEMENTS

Contracts are required for service(s) performed by an individual or a company, regardless of dollar amount. If a **contract** or **agreement** is associated with the requisition, the fully executed\* contract or agreement must be attached to the requisition.

The purchase of goods where the vendor designs a logo or artwork for NYIT will usually require a contract since NYIT will want to have language that grants us ownership to such logos or artwork. The purchase of goods where the vendor does not design content for NYIT generally does not require a contract.

### **Please note the following:**

- General Counsel must review and approve all contracts and agreements
  - EXCEPTIONS
    - hotel/motel contracts: send to the Procurement Director for review and approval
    - off-campus catering venues:
      - send **Venue and Catering Addendum** to vendor for signature
      - forward signed addendum and contract to Procurement Director for review and approval
  - Individuals authorized to sign contracts and agreements on behalf of NYIT are the President, Provost, General Counsel, or a Vice President (subject to certain limitations).
  - If a vendor is operating under a master agreement or blanket agreement, the department must have a fully executed assignment document that references the master agreement or blanket agreement, along with the current proposed scope of work and pricing terms.
  - Verify insurance requirements with the Controller's Office (Barbara Holahan).
  - Email a copy of the fully executed contract or agreement to General Counsel ([erika.amberger@nyit](mailto:erika.amberger@nyit.edu)).

\*fully executed = reviewed and approved by General Counsel, signed by an authorized signatory of NYIT and the vendor.

## 4. UMB VISA P-Card

One of the benefits of having a UMB VISA P-Card includes the ease of making single transaction, small dollar purchases.

The cardholder application is available on the Procurement website:

[https://www.nyit.edu/policies/collection/umb\\_visa\\_procurement\\_card\\_policies\\_and\\_procedures](https://www.nyit.edu/policies/collection/umb_visa_procurement_card_policies_and_procedures)

- All applications require the approval of the President, Provost or Vice President.
- Training is mandatory; to receive a Pcard, all cardholders must obtain a passing score on a test upon completion of training.

#### 5. REQUEST FOR PURCHASE BY CREDIT CARD

If a vendor does not accept a PO and the requisitioner is not in possession of an NYIT P-Card, you may request a credit card payment through Procurement Services. **Anyone, including P-Card holders, wishing to make a purchase from Amazon, E-Bay or PayPal must request a credit card payment through Procurement Services.**

- Complete the **Request for Purchase by Credit Card** form.
- Send the completed form to [rvillaum@nyit.edu](mailto:rvillaum@nyit.edu).
- Please allow 48 hours processing time.
- Procurement Services will notify you and provide confirmation when we have placed your order.

#### 6. TRAVEL

Shorts Travel is NYIT's preferred vendor. For online booking:

- [WWW.SHORTSTRAVEL.COM/NYIT](http://WWW.SHORTSTRAVEL.COM/NYIT) for NYIT Staff and Faculty
- [WWW.SHORTSTRAVEL.COM/NYITBEARS](http://WWW.SHORTSTRAVEL.COM/NYITBEARS) for NYIT Athletics

To contact a dedicated agent (available 8a-5p ET)

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|-----------------------|--------------|--|
| 1. Staff and Faculty  | 877-263-2550 | <a href="mailto:state@shortstravel.com">state@shortstravel.com</a>             |
| 2. Coaches/Recruiting | 877-225-0146 | <a href="mailto:recruitment@shortstravel.com">recruitment@shortstravel.com</a> |
| 3. Team Travel        | 866-902-9654 | <a href="mailto:teamtravel@shortstravel.com">teamtravel@shortstravel.com</a>   |

#### 7. OFFICE SUPPLIES

Office Depot is NYIT's preferred office supplies. To facilitate orders, employees with an NYIT Procurement Card may set up user profiles with Office Depot and place orders online. Contact Procurement services for more information or to set up a user account.

#### 8. CHARTER BUS SERVICES

Departments may secure reservations for charter bus service. For information:

[https://www.nyit.edu/administrative\\_offices/charter\\_bus\\_information](https://www.nyit.edu/administrative_offices/charter_bus_information)

- Bids from all three (3) companies must be obtained for trips in excess of \$5,000.

#### 9. CAR SERVICE

NYIT has a 5% discount arrangement with Delux Transportation: 516 861-2038.

- Delux accepts the NYIT P-Card or a personal credit card for payment.

**\*\*\*PLEASE CONTACT PROCUREMENT SERVICES FOR QUESTIONS OR EMERGENCY REQUESTS\*\*\***

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