

## Guide to Making University Purchases

### Step 1

Are the goods or services available in-house?

Business Services

Transportation Services

Travel Services

University Printing

Terp Services

Copy Center

Mail Services

Chemistry Stores

Dining Services

Environmental Safety

Facilities Management

Office of Information Technology

Physical Distribution Center

Office Max and Rudolph's Office Supply Contracts

Terrapin Trader

Storage Center

Physics Stores

### Step 2

Does the State require that we purchase the goods or services from "Preference Providers"?

Maryland Correctional Enterprise (formerly SUI)

Blind Industries and Services of Maryland (BISM)

Maryland Works

### Step 3

Is the transaction within Delegated Procurement Authority?

\*Purchasing Card (all unrestricted small dollar transactions) <\$5,000

\*Small Procurement Order (small dollar transactions excluded from purchasing card and travel card) <\$5,000

Travel Card (limited to travel related transactions within Delegated Procurement Authority) <\$5,000 unless from a contract vendor

\*Master Contract Release (only applies to vendors/purchases with whom we have established a Master Contract) >\$5,000

### Step 4

Submit a Requisition for Purchase to the Department of Procurement and Supply. For competitive purchases include:

Requisition for Purchase

Specifications

Performance requirements

Estimated dollar amount

Funding source

\*List of potential vendors

\*Please consider making such purchases with State Certified Minority Businesses (MBE) and Small Businesses (SBE).

Your requisition will be assigned to a procurement specialist. The procurement specialist will contact you to review your requirements and make recommendations that allow for maximum competition and result in the acquiring the best value for the University.

For sole source purchases include:

- Requisition for purchase
- Specifications
- Performance requirements
- Estimated dollar amount
- Funding source
- Sole Source Justification

Your requisition will be assigned to a procurement specialist. The procurement specialist will contact you to review your requirements and discuss the validity of the sole source. Further, he/she will determine that a sole source exists and research the requirement to ensure the cost is fair and reasonable.

For competitive and sole source purchases when the funding source is a grant or contract, include approval of the expenditure from ORAA.

### **Step 5**

Contact the Department of Procurement and Supply with questions/concerns.

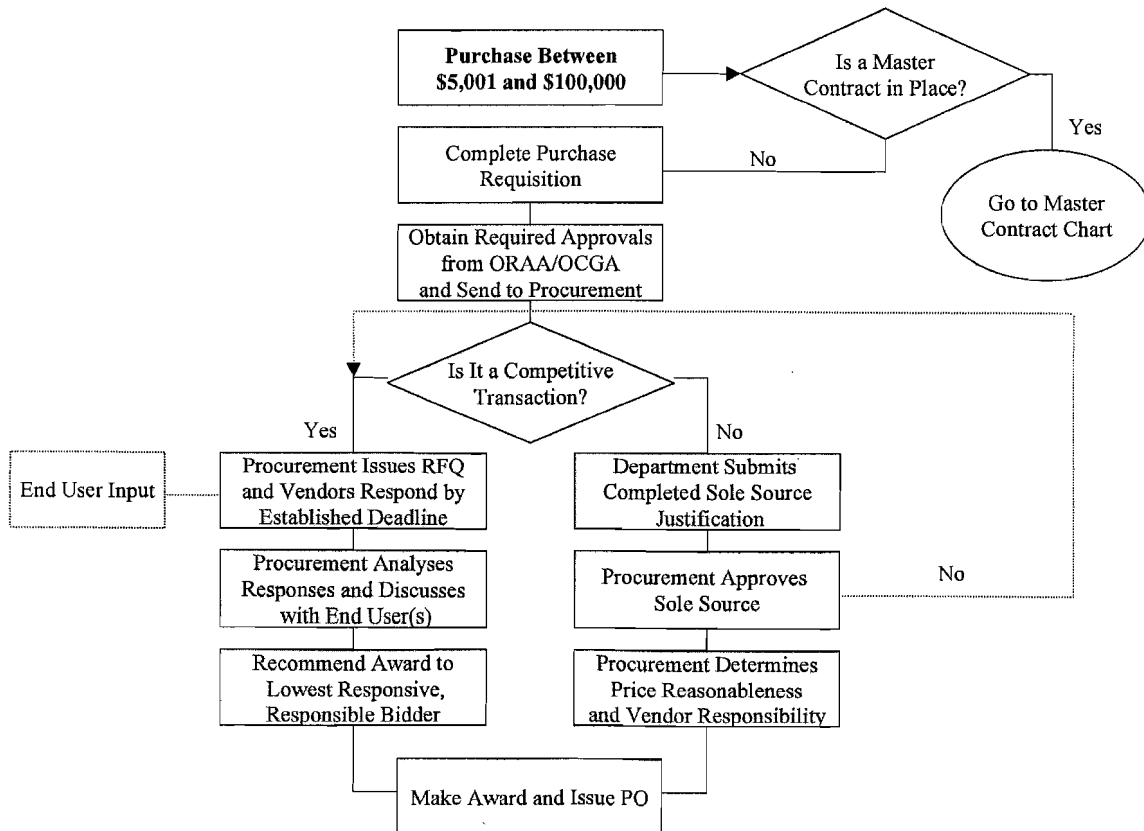
Department of Procurement and Supply  
2113-R Chesapeake Building  
Main Phone 301-405-5813  
Main Fax 301-314-9565  
Website [www.purchase.umd.edu](http://www.purchase.umd.edu)

**If the Dollar Amount of the Transaction is between \$5,001 and \$100,000 (including any option years):**

Please be aware that \$5,000 is the threshold for competition within the Department of Procurement & Supply. This means that Procurement must seek competition for any requirement in excess of this amount. In very special circumstances, sole source procurements may be justified.

If the requirement is competitive (i.e. more than one source could fulfill the requirement), then please provide information such as one or more recommended sources for the item. If the requirement is a service, provide a Statement of Work. Procurement will issue a Request for Quotation (RFQ) package to multiple vendors. Please note that the procurement specialist may designate the procurement as "small businesses reserve", allowing only certified small business to participate in the competition. Once quotes are received and analyzed, award will be made to the lowest responsive, responsible offeror. Procurement has established a turnaround goal of 14 calendar days for completion of a competitive transaction.

A sole source purchase (i.e. procurement without competition) is authorized under limited conditions and subject to written justification documenting the conditions that preclude the use of a competitive process. If Procurement determines that there is only one source that will satisfy the requirements and/or circumstances present, Procurement may negotiate and award a contract without competition to the sole source. If you have a sole source transaction, complete and sign the Sole Source Justification form found on the web at <http://www.purchase.umd.edu/general/forms>. Procurement has established a turn-around goal of 10 calendar days for sole source transactions between \$5,001 and \$100,000. This 10-day period begins upon Procurement's receipt of a complete package (requisition plus completed and signed sole source justification form with persuasive justification in sufficient detail to clearly establish the transaction as sole

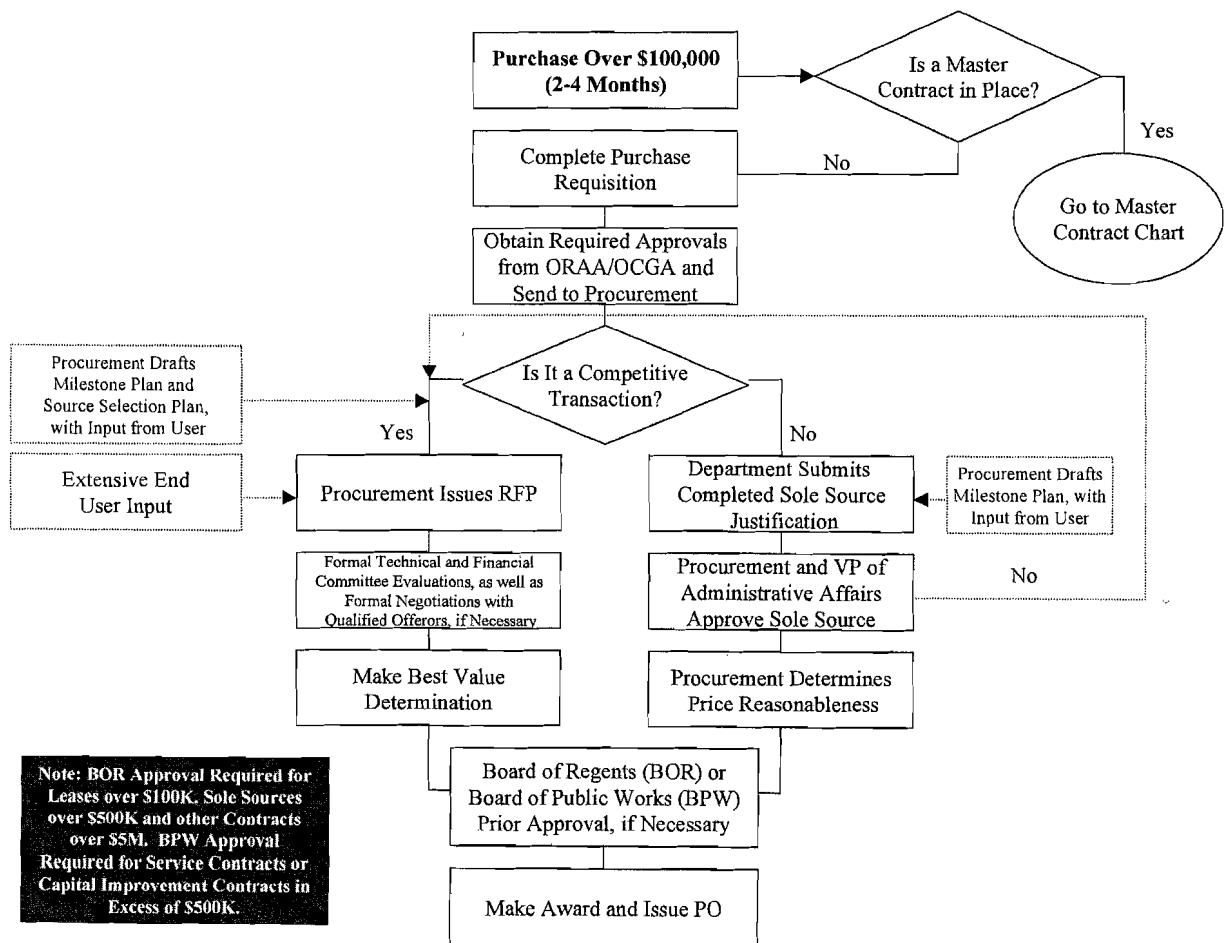


source). If Procurement does not approve the transaction as sole source, then it will be handled as a competitive transaction.

**If the Dollar Amount of the Transaction exceeds \$100,000 (including option years):**

Procurement utilizes a different process for competitive requirements exceeding \$100,000. Typically, Procurement issues a formal Request for Proposal (RFP) package, containing a complete and detailed Statement of Work, to multiple vendors and makes award(s) based on our evaluation of the "best value" to the University. Technical and Financial proposals are formally evaluated by separate committees. Use of the RFP process also involves Procurement creating a Source Selection Plan and a Milestone Plan. The end user representative agrees to both of these plans prior to issuance of an RFP. The RFP process typically takes between 2 and 4 months and includes significant involvement from the using area, so the importance of involving Procurement well in advance cannot be overstated.

The process for handling sole source transactions in excess of \$100,000 does not differ significantly from lower-dollar sole source transactions, except that the sole source justification acquires the additional approval of the Vice President of Administrative Affairs. The USM Vice Chancellor of Administration and Finance must also be notified when a sole source exceeds \$100,000. If the sole source exceeds \$500,000, prior approval from the USM Vice Chancellor is required. As a general rule, the higher the dollar amount of the transaction, the more compelling the sole source justification must be.



**Director**  
*James Stirling*

**Small & Minority Business Programs Administrator**  
*Victoria Leatherwood*  
Compliance Specialist  
*Kathryn Harris*

**System Analyst (Comptroller)**  
*Joseph Lederman*

**Associate Director Supplies & Services**  
*James Haley*  
*Location: Chesapeake Bldg*

**Assistant Director Physical Distribution**  
*Larry Walton*  
*Location: Physical Distribution Ctr*

**Associate Director Construction & Facilities Services**  
*Joe Vogel*  
*Location: 0410 Service Bldg*

**Assistant Director Delegated Procurement**  
*Marty Newman*  
*Location: Chesapeake Bldg*

**I.T. & Scientific**  
Coordinators  
*Mary Ann Zimmerman*  
*Bruce Brewer*

**Commodities & Services**  
Manager  
*Vacant*  
Procurement Specialists  
*Paula Mandelman*  
*Vickie Underwood*  
*Lucy Sanchez*  
*Patty Butner*  
*Richard Fowlie*  
Buyers/Buyer Assoc.  
*Kathy Barrett*  
*Jeffrey Turner*  
*April Weimer*

**Administration**  
Business Manager  
*Harry Sheets*  
Support Staff  
*Tracy Schlegel*

**Terrapin Trader**  
Manager  
*Mike Painter*  
Storekeepers  
*Carl Merica*  
*Lamont Timmons*  
*Vacant*  
Support Staff  
*George Shettle*

**Transportation & Distribution**  
Manager  
*Doug Waterman*  
Storekeepers  
*Nick Trainor*  
*George Williams*  
*Harry Teabout*  
*Charles Koehnlein*

**General Stores**  
Manager  
*Sidney Salazar*  
Support Staff  
*Leslie Siciak*

**Construction & A/E**  
Coordinators  
*Rex Fitch*  
*Thomas Blanchard*  
Buyers/Buyer Assoc.  
*Christine O'Brien*  
*Jennifer Ireland*  
*Tanida Sombatpium*

**Facilities**  
Manager  
*Karen Elvidge*  
Procurement Specialists  
*Denise Elliott*  
*Lisa Thompson*  
Buyers  
*Carole Simpson*  
*Vicki Stoner*

**Purchasing Card**  
Administrator  
*Kristina Libby*  
Support Staff  
*Kristin Stenson*

**Administration**  
*Tammy Yanulevich*  
*Melvin Contee*