

Welcome to The Procurement Training Seminar

Five light purple circles are arranged in two rows. The top row contains three circles, and the bottom row contains two circles. The circles are of varying shades of light purple, with some being solid and others being hollow outlines.

November 2009

Purchasing and Contracting at a New York State Agency



Presented by:

- Commodity Purchasing and Contracting
 - Presented by Joanne Joy, Purchasing Manager
 - Terri Barbaretti, Purchasing Agent
- Service Purchasing and Contracting
 - Presented by Laura Beck, Contract Officer

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● Agenda

- **General Procurement Requirements**
- **Purchasing of Equipment Supplies & Services**
- **Purchasing Definitions**
- **Non-Competitive Procurement**
- **Types of Commodity Contracts & Commodity Assignments**
- **Types of Service Contracts & Service Assignments**
- **PO Number Alpha Suffixes**
- **Summary and Questions**

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- **General Procurement Requirements**

- **Procurement required Documentation:**

- A copy of Vendor Agreement, or detailed description and specifications
 - Who: Vendor of choice or list of vendors

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- **General Procurement Requirements**
 - **Call Purchasing to see if a contract may already exist for the service or commodity you are requesting. We are available Monday through Friday 7:30am to 5pm 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**

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- **Purchasing of Equipment, Supplies and Services**
 - **Estimated Cost: \$0 - \$20,000**
 - Statement of reasonableness of price required ([Price Justification](#))
 - Estimated order time: 1-5 days ([Price Justification](#))
 - **Estimated Cost: \$20,000.01 - \$50,000**
 - Advertisement of NYS Contract Reporter
 - Statement of reasonableness of price ([Price Justification](#))
 - Estimated order time: 25 to 40 days
 - **Estimated Cost: \$50,000.01 - \$125,000**
 - Minimum of 3 written quotes
 - Advertisement in NYS Contract Reporter
 - Estimated order time: 25 to 40 days

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- **Purchasing of Equipment, Supplies and Services**
 - **Estimated Cost: \$125,000.01 - \$250,000**
 - Advertised in New York State Contract Reporter
 - Minimum of 5 sealed bids solicited by Purchasing
 - Estimate order time: 30 to 45 days

 - **Estimated Cost: \$250,000.01 and over**
 - Advertisement in NYS Contract Reporter
 - Prior approval of OSC
 - Estimated order time: 45 and 60 days.
 - Minimum of 5 sealed bids solicited by Purchasing

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● PURCHASING DEFINITIONS

- Sole Source Procurements
- Single Source Procurements
- Minority and Women's Business Enterprise (MWBE)
- Preferred Sources
- Invitation for Bids (IFB)
- Request for Proposals (RFP)
- Lobbying Law
- Split Orders

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- **Non-Competitive Procurement**
 - **Sole Source, Single Source and/or Proprietary Purchase**
 - **Emergency Purchase (unanticipated purchase required to protect safety, life or property)**
 - **Small Business , New York State Certified MWBEs**
 - **Minority Sub-Contracting Goal: 3%**
 - **Women Owned Sub-Contracting Goal: 3%**
 - **Preferred Sources(right of first refusal)**
 - **Centralized State Contracts**

State purchase of requirements exceeding \$2,500 without competitive bidding may be made under the situations listed only after approval is granted by the appropriate campus designee.

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- Types of Commodity Contracts
 - PC OGS Contracts
 - PA Local Contracts

Commodity Assignments



Employee	Assignments
Joanne Joy- Section Manager (631) 632-6046	Major Equipment Purchases, Stony Brook Foundation, Fuel Oil.
Judy Reese (631) 632-6057	Major Equipment Purchases, Copier Purchases/Laboratory Supplies/ Equipment, Landscape Supplies, Marine Science Supplies/Equipment.
Terri Barbaretti (631) 632-6071	Dental Equipment & Supplies, Pharmaceuticals/Medical Supplies/ Equipment, Printing, Major Equipment Purchases.
Dorothy Klevanosky (631) 632-6059	Construction Supplies, Electrical/Electronic Equipment & Supplies, Machinery and Supplies, Maintenance/Power Plant Supplies, Plumbing, Power, Hand Tools, Vehicle Acquisitions, Automotive Supplies/Repair.
Lynn Patterson (631) 632-4154	Athletic Equipment & Supplies, Carpeting Purchase & Installation, Drapes/Blinds, Fine Arts Supplies/Equipment, Library Equipment Supplies, Furniture, signs.
Joann Sanford (631) 632-4155	Custodial Supplies/Equipment, Promotional Items, Clothing, Animals, Feed and Supplies, University Police Uniforms/Supplies/Equipment, Stony Brook Foundation Funds, Fire Safety, Security Systems.
Joanne Del Bianco (631) 632-4340	Air Conditioning & Refrigeration, Appliances (Commercial/Domestic), AV Equipment/Supplies, Communication Equipment/Supplies, Computer Equipment & Supplies, Photographic Equipment & Supplies, Stony Brook Foundation Funds.
Lisa Rizzo (631) 632-6048	Stony Brook Foundation Fund, Food Purchases (\$0-\$20,000), Office Supplies & Equipment, Registrations, Name Plates.
Irene Wagner (631) 632-1087	Books/Publications, Reimbursements, Subscriptions, Memberships, Construction Supplies& Equipment, Office Supplies Equipment

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● Types of Service Contracts

- C Contracts – State Service Agreements exceeding \$250,000
- T Contracts – State Service Agreements not exceeding \$250,000
- L State Lease of Real Property
- W State Purchase of Real Property
- CM State SUNY Admin. Contracts
- X State Revenue Contracts
- D0 State Construction, A&E Contracts
- MOU State Agreements between State Agencies

Service Assignments



Employee	Assignments
Mary H La Corte Asst Director (631) 632-9849	Contract Review, Major Agreements
Fran Gandia Service Contract Manager (631) 632-9094	Service Contract Performance, Monitoring and Compliance
Dave Smith (631) 632-9065	Custodial/Building Maintenance, Grounds Maintenance, Construction/Rehab., Landscaping, Towing, Skilled Labor, Lab Testing Services, HVAC Maintenance/Repair
Laura Beck (631) 632-622913	Refuse/Snow Removal, Hazardous Waste, Architect/Engineering Services, Road Maintenance/Repair, CCTV Maintenance, Criminal Background, Utility Mark-out, Bus Services/Mail Services, Asbestos Abatement, Elevator Maintenance, Hazardous Waste, Leases, Air Monitoring Services
Deborah Marcus (631) 632-6066	Banking Services, Revenue/Affiliation, IT Services, Software Licensing, Cablevision Service, Equipment Maintenance/Repair, Architect/Engineering Services, Advertising, Construction/Rehab., Consultant Services, Supportive Labor, Card Access, Internet Service, Building Maintenance/Custodial, Contractual Temp Services, Student Health Insurance
Marie D'Andrea (631) 632-6066	Moving Services, Construction/Rehab, Sharps Collection, Excavating Services, Film Badge Services, Irrigation System Maintenance, Maint Research, Architect/Engineering Services, Performing Artists
John Mastromarino (631) 632-9779	Pest Control, Security Services, Equipment Maintenance, Special Events, Production Services, copy Machine Maint, Water Treatment, Cellular Telephone Services, Telecommunication, Drapery Cleaning/Repair, Fire 13Extinguisher Maintenance, Cadaver Transportation/Cremation, Athletic Insurance
Myoshe Evans (631)632-4181	Support Staff
Jonathan Rios (631)632-9060	Bid Coordinator

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Purchase Order Number Alpha Suffixes

Suffixes are used to identify specific order types:

A = Prepayments including registrations, memberships, subscriptions, etc. Checks are returned to the campus to be mailed with attachment to vendor.

C = Service/Maintenance Transactions

D = Do Not Inspect (not inspected by Central Receiving)

N = Not delivered through Receiving

Q = Payment requires departmental approval

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- **Summary**

Don't forget Procurement Staff are always available to assist you Monday through Friday from 7:30 AM to 5:00 PM.

Please do not hesitate to contact us.

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QUESTIONS ?

Thank You