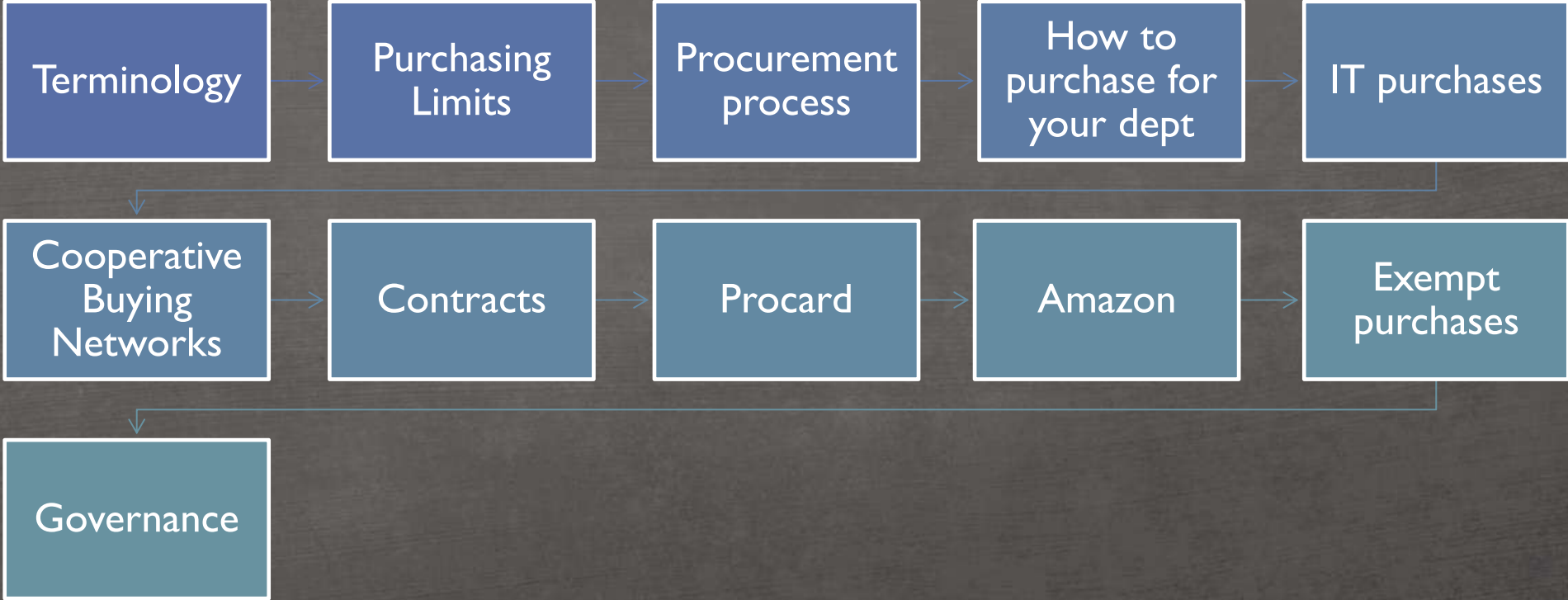


PURCHASING BASICS

- PRESENTED BY: JESSICA GOSSETT, ASSISTANT DIRECTOR OF PROCUREMENT SERVICES
- LEILANI WHITE, CONTRACT ADMINISTRATOR

LEARNING OBJECTIVES



TERMINOLOGY

- Master PO
- PO
- Requisition
- Encumbrance
- Contract/ Service Agreement Delegated purchase limit
- Bid/Quote
- RFP/ITB
- SOW
- Exempt purchases
- Emergency purchase
- Sole Source
- HUB
- Competitive Bid
- T&C
- MOU

DELEGATED PURCHASING AUTHORITY

- <\$15k = multiple bids/quotes not required
- >\$15k = 3 bids/quotes (informal)
- >\$50,000.01 = Formal bid- work directly with procurement

- Freight Costs must be included in all dollar limits listed above
- Large purchases **may not** be divided into small lot purchases in order to meet the specified dollar limits

HOW DO I PURCHASE FOR MY DEPARTMENT?

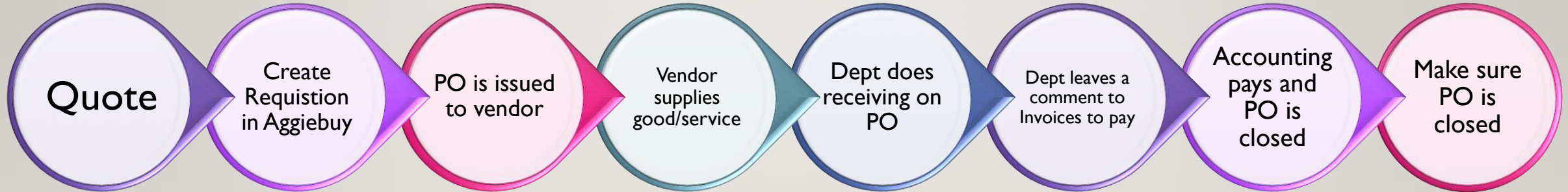
AGGIEBUY

- Purchase Order (PO)
- Stipends (Non-PO Invoice)
- Reimbursement to employees (Non-PO invoice)

PROCARD

- Company credit card
- Convenient – can be used to purchase from websites

PROCUREMENT PROCESS




WHAT DOES A QUOTE LOOK LIKE?

From: randy personalizedprinting.com <randy@personalizedprinting.com>
Sent: Tuesday, October 8, 2024 8:37 AM
To: Hailey Hanna <Hailey.Hanna@tamuc.edu>
Subject: RE: Quotes for Impact Reports

External Email

Brochure –
1200 = \$828.15

9X12 Catalog Env –
1200 = \$621.00



Rhino Sports & Entertainment Services, LLC
500 W. 5th Street, Suite 1200
Winston-Salem, NC 27101
Phone: 336-245-1162

ESTIMATE	
Date	Number
10/15/2024	QUOTE
Due Date	QUOTE

Bill To:
Texas A&M Commerce Athletics
Juan Olivo
juan.olivo@tamuc.edu

QUOTE
Thank you for the opportunity to serve you!

Event Name: TAMUC Homecoming Concert Event Date: October 18, 2024

Invoice	# of Emp	Rate	Total Hours	Total \$\$
Concert Staff (10/18 @ 18:30 – 10/18 @ 22:30)	15	\$ 34.50	60	\$ 2,070.00

Total Hours	60.00
Total Invoice	\$ 2,070

ESTIMATE

Prepared For
Texas A & M Commerce
PO Box 3011
Commerce, TX 75429
(469) 855-4221

Top Line Turf LLC
713 Pickford St
Meridian, ID 83646
Phone: (360) 798-2828
Email: jeffwelch@toplineturfllc.com

Estimate # 589041
Date 10/04/2024
Business / Tax # 93-2475067

Description	Total
Synthetic Turf Installation	\$14,500.00
Removal and replacement of turf around home plate, pitchers mound, 1st-3rd base. Removal of bull pen turf sections at pitchers area and Home Plate areas. Complete and final groom of entire softball.	
Subtotal	\$14,500.00
Total	\$14,500.00

ORDER CATEGORIES & RECEIVING IN AGGIEBUY



1= Regular

(Po is sent to vendor)



2=confirming

(Po is not sent to vendor)
ex: Sodexo, Hotels



3= payment request
(already have an invoice
and services have already
been done) essentially you
have a non-compliant issue




Qty- receive based off
the amount of product
you received



Cost- receiving by dollar
value. Ex: construction
project, any vendor you
need to pay gradually rather
than all at once

WHAT AN INVOICE SHOULD LOOK LIKE:



Invoice		
Invoice Number: 308615	Invoice Date: 31-MAY-24	Page 1 of 1
PO Number	Terms 30 NET	Due Date 30-JUN-24

71 DAYS PAST DUE


Bill To: TEXAS A & M COMMERCE
PO BOX 3011
COMMERCE, TX 75429

Make Check To: AMR Ambulance Service, Inc.
PO Box 841439
Dallas TX 75284-1439

For Inquiries: ATTN: Sherry.gerhard@gmr.net
Phone: 720-514-4454
Fax: 877-244-6982
Federal Tax ID: 75-2474011

Line No	Description	Qty	UOM	Rate	Date Served	Extended Amount
1	ALS DEDICATED STANDBY EVENT-SOLAR ECLIPSE WATCH PARTY@COMMERCE TEXAS A&M STADIUM COMMERCE,TX	6	Hours	165.00	4/8/2024	990.00

RECEIVED
SEP 25 2024
ACCOUNTS PAYABLE



INVOICE

Ando Media, LLC
1440 Ste-Catherine W, Suite 1200
Montreal, QC
H3G 1R8
Direct Phone + 1 866 448 4037
Fax + 1 514 418 8702

Invoice: INA156048
Customer ID: 405070
P.O. Number:
Invoice Date: 10 October 2024
Due Date: 24 November 2024

TEXAS A&M UNIVERSITY-COMMERCE
Terryl Bratek
2600 S. NEAL
COMMERCE, TX 74529
USA

Confidential

RECEIVED
By Terryl Bratek at 1:35 pm, Oct 10, 2024

Page : 1 of 1

Description	Unit	Quantity	Unit Price	Total Price
OCTOBER FIXED CHARGES				
Tap Live CRF1	STATION	1	75.00	75.00
Tap for Pre-Roll	STATION	1	75.00	75.00
Audio Feed AAC KETRFM	FEED	1		
Live Streaming Data Transfer Base	GB	500		
Audio Feed Base	FEED	6		
Bundled Price		1		175.00
Audio Feeds CRF1	FEED	2	25.00	50.00
Log Export (NPR Clients Only) CRF1	STATION	1	50.00	50.00
SEPTEMBER CURRENT CHARGES				
Live Streaming Data Transfer Usage Tier 1	GB	150		
Live Streaming Data Transfer Usage Tier 2	GB	648	0.08	51.84
Audio Feed Usage Tier 1	FEED	4		

IT PURCHASE: HARDWARE, SOFTWARE, OUTSOURCING, TELECOMMUNICATIONS OR RELATED GOODS/SERVICES

AGGIEBUY

- Preferred way to purchase
- Put in like a normal requisition
- May have to fill out an exemption for the VPAT as well as accessibility exception

*Voluntary Product accessibility Template
(VPAT)

PROCARD

- MUST fill out the Procard IT approval form
- This will require you getting a VPAT from the vendor

Cooperative Contract

- These professional associations provide already contracted pricing: no need to get further bids when using one of these!
 - Texas Interlocal Purchasing System- TIPS
 - Educational Institutional Cooperative Services (E&I)
 - Buyboard
 - HGAC
 - Omnia Partners
 - Sourcewell

*links on purchasing webpage

PROCUREMENT FORMS

- Justification of Emergency Purchase
- Justification of Sole Source Purchases
- Non-Compliant Requisition form
- P-card application
- P-card IT approval form
- Procard Pre-approval form
- PF230 Internal invoice – used for companies that don't provide invoices
- PF230A Internal invoice – stipends only
- PF230.1 Internal invoice – replacing PF230 & PF 231 (combined these two into one- used for individuals providing a service to the university)
- Request for Proposal Requirements Submission
- Request for University-Owned Device
- HEF Guidelines
- Contract Risk Exercise

CONTRACT

THIS AGREEMENT made this _____
by _____
and between _____
and _____

day of _____

, 20____

(First Party)
(Second Party)

WITNESSETH: That in consideration
kept and performed on the part

1. Said party of _____

_____ covenants and agreements to be
_____ hereunto, respectively as herein stated:
_____ and agrees that it shall:

and said party of the second _____



CONTRACTS


Contract Administration is outlined in TAMU System Policy 25.07 (subject to revision).

Unless the University's ***Delegation of Authority*** permits, you may not execute contracts on the university's behalf.

An individual executing a contract on behalf of the university without authority may be personally liable for damages arising.


Reviewing and signing contracts should begin with the Procurement Office.

When in doubt, send an inquiry to contracts@tamuc.edu



**CONTRACT DEFINED:
CONTRACT ADMINISTRATION IS OUTLINED
IN TAMU SYSTEM POLICY 25.07 (SUBJECT
TO REVISION).**

An agreement, grant, license, or other instrument, including any amendment, extension or renewal, that creates a legally binding obligation on members of the system. The title or form of the document does not determine whether it is a contract. For example, a written document called an “agreement,” a “memorandum of understanding,” or “terms and conditions,” and even if it takes the form of a letter or a purchase order, may still constitute a legally binding contract.



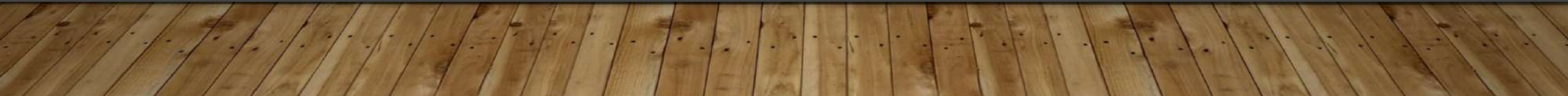
TYPES OF CONTRACTS: CAN INCLUDE, BUT IS NOT LIMITED TO THE FOLLOWING

- Grant Participation Agreements
- Financial Contracts
- Federal & State Regulatory Agreements
- Employee Benefits Contracts
- Employment Appointments
- Donor Agreements
- Collection Agency Agreements
- Advertising Agreements
- Addendums
- Amendments
- Service Agreements (most Common)
- Memoranda of Agreement/Understanding (Academic & Non-Academic)
- Purchase Agreements
- Affiliation Agreements/Affiliation Service Agreements
- Articulation Agreements
- Athletic Agreements
- Construction Contracts
- Consulting Agreements
- Equipment Lease Agreements
- Data Sharing Agreement
- State Procured Agreements
- Real Property Transactions
- Legal Settlements
- Inter-Agency and Inter-local Agreements
- Intra-System Agreements
- Intellectual Property
- Insurance-Partial Risk Transfer Contracts
- Research Agreements
- Revenue Generating Agreements
- Sales Agreements

YOUR CONTRACT RESPONSIBILITIES

- Create and manage your Requisition/Purchase Order for the agreement.
- Know your funding and accounts to be used before acquiring a proposal or agreement from the vendor.
- Provide your agreement document to me with ample time to review, make edits, negotiate, and execute.
- Carry out/control the duties and deliverables described in the scope of work that specifically names TAMUC's responsibilities.
- Ensure that a Certificate of Liability Insurance is received from the vendor (if required in the agreement) as soon as the Agreement is executed.
- Supervise your vendors
 - Making sure they stay within scope.
 - Making sure they stay within budget.
 - If an amendment is needed to accommodate a change in scope, funding, and/or term, please try to identify ahead of time and I can assist by creating an Amendment document.
 - If a change is made to the funding, you must create a Change Order to your PO.
- Know when the contract term expires or needs renewal.
- When your contracted service is over, please close your PO and release encumbered funds as necessary.

PROCARD



PROCARD

- Company credit card
 - Issued for convenience of departments
- The cardholder is responsible for their card and expense report
- Must take online training to obtain the card (train-traq 2111071)
- Highly recommended to attend the face-to-face training through Develop U
- Expense reports are submitted in Concur on the 10th of every month.
 - we will be transitioning to Chrome River early 2025
- Attaching Vendor Verify for purchases over \$500

PROCARD

- The Purchasing Card is for official business purposes only and **not for personal use**.
- The Purchasing Card **is not intended to avoid or bypass appropriate purchasing or payment procedures**. This program compliments existing processes.

Approved Items	Pre-approval	Prohibited purchases
Cleaning supplies	HEF purchase	Gift cards
Lab supplies	Printers, projectors, cameras, TV	Personal items
Medical Supplies	Software and computer equipment	Animals
Office supplies	Furniture	Consulting Services
Postage and stamps	Telecommunications equipment (excludes services)	Travel/Transportation for employee or students
Safety supplies	Grant- related or indirect cost	Fuel or Auto parts
Tools/hardware	Books	Tuition and fees
Business meals	Membership dues	TAMUC Market place
Services- not preformed on TAMUC property	Subscriptions	Capital equipment- \$5k or >

AMAZON BUSINESS ACCOUNT

- Business Prime shipping (2-day free shipping on eligible items)
- Automatic tax-exemption on items sold by Amazon LLC and other participating third- party sellers
- Business pricing and quantity discounts on select items
- Business Prime annual membership fee is funded centrally by the University, not per department
- Ability to create shopping list for frequently purchased items
- Access to a specialized, business-only Amazon Customer Service team

For Business Use Only

- The centralized East Texas A&M Amazon Business account should be used for **business purchases only**.
- Unauthorized purchases will be considered a misuse of the ProCard and could result in the loss of your ProCard privileges and require reimbursement to the University.

EXEMPT PURCHASES

- Advertising
- Conference Expenses
- Hotels and Conference Rooms
- Lecturers/Guest Speakers/Entertainers: fees for speakers/lecturers/entertainers hired on a one-time basis (does not include fees for speakers on a continuous basis)
- Student Travel: expenses related to student travel
- Library materials: specific for East Texas A&M Libraries
 - Legislative information services: bill analysis services
 - Membership fees and dues
 - Rental of exhibit space (booths for display purposes)
 - Goods and services provided by the Texas Department of Criminal Justice
- Goods and services provided by the Texas Industries for the Blind and Handicapped
- Internal repairs
- Newspaper and magazine subscriptions direct from the publisher
- Freight
- Postage
- Services provided by other State of Texas agencies, System members, or by other local governments (inter-agency and inter-local agreements must be reviewed by Procurement Services)
- Insurance premiums
- Acquisitions from federal agencies
- Utilities
- Acquisition of livestock
- Catering services (on-campus food services vendor)
- Group Purchasing Programs (Co-Op)
- Medical Doctor Services
- Acquisitions from the GSA Contracts
- Software
- Artists (Painters, Sculptors, Compositions, Performers)
- Works of Art
- Employee & Prospective Employee Travel
- Registration fees and associated books and materials

GOVERNANCE

- Procuring goods and/or services at East Texas A&M are governed by three entities. Each entity has specific procedures, rules, policies and codes that must be followed. The entities are:
 - State of Texas
 - Texas A&M University System
 - East Texas A&M University

