

***SOUTHERN UNIVERSITY AND
AGRICULTURAL & MECHANICAL COLLEGE
BATON ROUGE***

PURCHASING DEPARTMENT

How to Do Business with Southern University



VENDOR'S GUIDE

www.subr.edu

SOUTHERN UNIVERSITY BATON ROUGE CAMPUS

LOCATION

Southern University is located in North Baton Rouge along Scott's Bluff facing the Mississippi River. A red stick was placed in the ground on the bank of a bayou at a place known as Scott's Bluff, to settle a border conflict over hunting grounds between the Houma Indian Tribe and the Bayougoula Indian Tribe. This marker on the east bank of the Mississippi River was the predecessor of modern Baton Rouge, Louisiana. The French name "Baton Rouge" means "Red Stick" in English. The commemorative sculpture shown below has been erected on the Southern University Baton Rouge campus.



Sculpture by Frank Hayden



J. S. Clark Administration Building Annex

The Purchasing Department is located in the J. S. Clark Administration Building Annex-First Floor East.

Bidders are solely responsible for ensuring timely delivery of their bids/quotations. The Purchasing Department is not responsible for any delays caused by bidders' chosen means of bid delivery. Failure to meet bid opening dates and times result in rejection of bids.

Our Mailing Address:

Southern University
Purchasing Department
Post Office Box 9534
Baton Rouge, LA 70813

Our Street Address:

Southern University
Purchasing Department
James J. Prestage Drive
Baton Rouge, LA 70813

Our telephone number:

225-771-4580

Our fax number:

225-771-2026

Our website:

www.subr.edu

State Purchasing Website:

www.state.la.us/osp.htm

SOUTHERN UNIVERSITY PURCHASING DEPARTMENT

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PURCHASING DEPARTMENT CONTACTS & GENERAL RESPONSIBILITIES

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Responsible for Procurement for entities on the SUBR Campus; the Southern University System Office, Baton Rouge Campus, Ag. Center

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General Office Manager; Assist the Director; Audit Purchase Requisitions; Request for Proposals; Request for Bids and Purchase Orders; Purchase Order Changes; Banner Input

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Professional Services Contracts; Special Projects; Request for Proposals (RFP); Protest Hearings; Office of Contractual Review Coordinator, Banner Input

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Request for Quotations; Purchase Orders; Travel, Food Service (Aramark), Insurance Claims; Capital Outlay; Purchase Order Changes; Banner Input

INTRODUCTION

The Purchasing Department is under the authority of the President/Chancellor's Office and is a Division of Finance and Administration.

The mission of the Purchasing Department is to implement sound procurement practices in accordance with executive policy and legislative mandates, and to provide quality and timely services to the agency and vendor communities. In keeping with our mission, we are offering basic information to assist you in preparing and processing purchasing documents.

The information contained in this manual is subjected to change and the changes are based on the State of Louisiana Revised Statutes and Legislative mandates. Information may be amended by the Director of Purchasing to ensure compliance with all governing procurement directives, policies, rules, regulations and statutes. ***Nothing contained herein shall be construed to amend or override any statute, rule, regulation, policy or procedure of the State of Louisiana, or the provision of any document used in any competitive procurement. It is offered only as a guide in making Procurement decisions.***

Each campus internal policies should complement these guidelines and may be more stringent or require additional approval(s) than the guidelines offered.

PROCUREMENT STATUTES

State agencies shall be in compliance with statutes governing procurement passed by the Louisiana Legislative body.

Some primary statutes governing procurement are listed below:

RS 38:2211 - 2296 Public Contracts

RS 39:1481 - 1526 Professional Services (handled by OSP, Professional Contracts)

RS 39:196 - 200 Data Processing

RS 39:1527 - 1546 Insurance

RS 39:1551 - 1736 Louisiana Procurement Code

RS 39:1695 Late Payments

RS 39:1761 Lease/Purchase

RS 42:1101 - 1170 Code of Ethics

RS 43:1 - 34 Printing

RS 43:111 - 211 Advertisements

RS 44:1 - 41 Public Records

44 CFR 13.36

ETHICS STATEMENT

All public purchasers are required to adhere to the ethical standards for public servants. Care must be exercised to avoid impropriety. The Code of Governmental Ethics can be found by searching under Legal Info/Louisiana Law Search/RS 42:1101-1170 from our website at <http://www.doa.la.gov/pages/osp/Index.aspx>

Vendor Selection

Vendors may request to be added to the Southern University Purchasing Department Bidder's list. Vendors are required to send a W9 Form, Register with the Secretary of State Office and/or Register with location of business.

Vendors may request to be added on State Contract through State Purchasing that will allow items on state contract to be sold to Southern University

Vendors may register with Louisiana Economic Development at www.LED.Louisiana.gov with the Small & Emerging Business Development Program (Hudson and Veteran Initiative Programs). This initiative provides additional opportunities for certified Louisiana based small entrepreneurships to participate in contracting and procurement with the State of Louisiana. The state encourages use of small vendors and Veteran owned companies.

Vendors are also selected from State Purchasing bidder's list through the bid process when bids are posted on the state web site LAPAC (LA Procurement and Contract Network)

UNAUTHORIZED PURCHASES

Other than the purchasing procedures for emergency purchases and purchases made with the LaCarte Procurement Card, it is against University policy to make purchases in the name of the University without a purchase order.

Vendors shall adhere to this policy.

In its regular meeting of May 7, 1977, the Southern University Board of Supervisors adopted the following motion relative to unauthorized purchases:

“It shall be against policy for any person to incur an obligation on behalf of Southern University or any agency thereof, other than in accordance with University policy.

“Any employee or group of employees of the Southern University System who incur obligations in the name of Southern University or any agency thereof without following the proper and established University procedures and policies shall be personally responsible for the obligations incurred.

“The University will not pay any obligations incurred by a student, student organization, or any other person or organization which does not conform to the policies and procedures of the University.”

PROCUREMENT GUIDELINES

All procurement or purchases shall be made at Southern University using the following guidelines and directives:

1. Purchases up to \$5000.00 require one (1) written quotation. No competitive bidding is required.
2. Purchases over \$5000.00 and up to \$15,000.00 require three (3) written quotations
3. Purchases up to \$15000.00 and up to \$24,999.99 require five (5) written quotations
4. Purchases \$25,000.00 or more require a sealed Bid to be sent to at least five (5) vendors and advertised in the State Journal Newspaper and online through the State of Louisiana Purchasing Network Service (LaPAC) in accordance with R.S. 39:1594.

Exceptions for Sealed Bids

1. Public Works Contracts less than \$150,000.00

"**Public Work**" means the erection, construction, alteration, improvement, or repair of any public facility or immovable property owned, used, or leased by a public entity. Public work includes labor and materials. (See R.S. 38:2212 A).

There are no statutes governing *public work* contracts that are less than **\$150,000**. However, the Legislative Auditor recommends that for any public works project in excess of \$25,000, the governmental entity solicit at least three (3) bids.

The contract limit shall be equal to \$150,000 per project including labor, materials, and equipment. Contracts cannot be broken down or purchase requisitions cannot be split as to avoid the Public Bid Law.

2. FEMA (Federal Emergency Management Agency) Funding

Statute 44 CFR 13.36 methods of procurement:

Procurement by small purchase procedures. Small purchase procedures are those relatively simple and informal procurement methods for securing services, supplies, or other property that do not cost more than the simplified acquisition threshold fixed at 41 U.S.C. 403(11) (**currently set at \$100,000**). If small purchase procedures are used,

price or rate quotations shall be obtained from an adequate number of qualified sources. Failure to do so may result in funding being repaid to FEMA by the University.

Request for Proposal (RFP)

Used when seeking a solution to a definitive problem, for highly technical equipment, complex services or contracting with a group purchasing organization. Award is made to the responsible bidder whose proposal is the responsive and advantageous to the state with consideration to cost as well as other evaluation criteria. Highly technical RFPs must be sent to the Purchasing Department to be forwarded to the Louisiana Office of State Procurement.

Software Purchases

If software only, one (1) written quote is required up to \$100,000.00

If over that amount, approval is required from Louisiana Office of State Procurement

Hardware Purchases

If over \$100,000.00 and not on state contract, approval is required from Louisiana Office of State Procurement

Technology Purchases

Computers, computer hardware, software, software licenses, iPads, printers, projectors and other related purchases shall be approved by the Vice President of Technology and Information System before the purchase order is processed.

Wire and Cable Services

Require prior approval by the Vice President of Technology and Information System and the Louisiana Office of Telecommunication (OTM). OTM sends an approved contract imprinted with a state seal and the OTM logo.

State Contracts Purchases

No competitive prices are required for state contract purchases. Statewide contracts are developed to the needs of state agencies, to standardize, to combine usage for lower prices, and to ease the purchase process of commonly used items. Prices are obtained by the State Office of Procurement, this eliminates the taking of bids or quotations or both, effecting considerable savings in time and money.

Cell Phones/Wireless Hotspots

Cell phones and wireless hotspots require prior approval of the Vice Chancellor for Finance & Administration.

Emergency Purchases

An emergency condition is a situation which creates a threat to public health, welfare, safety, or public property that may arise by reason of floods, epidemics, riots, equipment failures or such other reasons as may be proclaimed by the chief procurement officer. The existence of such conditions creates an immediate and serious need for supplies, services, or major repairs that cannot be met through normal procurement methods and the lack of which would seriously threaten the function of Louisiana government; the preservation or protection of property; and the health or safety of any person.

If an emergency occurs, if time permit, three (3) vendors should be contacted to request a quotation, if the amount is over \$5,000.00.

If time does not permit, contact one (1) vendor, send letter of justification/explanation to the Purchasing Department along with purchase requisition and quotation. A letter is required with all emergency purchases.

Note: The State Office of Risk Management and Capital Outlay prefers at least three (3) quotes. **Poor planning does not justify emergency purchases.**

Sole Source Purchases

Sole source procurement is permissible only if a requirement is available from a single supplier. This means the supply is sold only by a single supplier which is usually the manufacturer.

Requirements:

- Sole Source Form
- A written quotation is required and letter from the vendor and requestor
- Two additional vendors are solicited

Authorized Dealer Purchases

The Louisiana Procurement Code requires that maximum competitive bids shall be obtained (where the cost exceeds \$5,000.00) in accordance with R.S. 39:1655. An exception to minimum competitive requirements for authorized dealer purchases.

- An “Authorized Dealer Certification Form” must be completed by authorized vendors for **repairs** and/or **parts**
- The form is used for services over **\$5,000.00**

Examples of authorized vendors for repairs and parts are: office machines, automobiles, scientific equipment, elevators, boilers, heating/air conditioners, appliances, etc.

Vehicle Purchases (New)

A letter of explanation is required to purchase vehicles which should include the type of purchase, the purpose for the vehicle, the number of drivers per year, and the estimated mileage per year. A vehicle must be trade-in in to the State Office of Surplus

before adding to the fleet. If a vehicle is not available, it must be justified in writing and approved by the Office of State Procurement.

Vehicles are purchased from the state contract. The University is not allowed to solicit bids for new vehicles.

Vehicle Purchases (Pre-Owned)

Pre-owned vehicles must be purchased from the Louisiana Property Assistance Department *only*. A vehicle must be trade-in before adding to the fleet. If a vehicle is not available, it must be justified in writing and approved by the Office of State Procurement. The University is not allowed to solicit bids for used vehicles.

Used Equipment Purchases

- Buying used equipment may result in savings to the University. A letter is sent to the Purchasing Department to request the purchase of used equipment.
- Letter should include: The price for which the used equipment may be obtained
- The plan for maintenance and repair of the equipment, if applicable
- The savings that will accrue to the State/University
- A written quotation from the vendor
- A purchase order is processed, if approved by the Chief Procurement Officer

Scientific Purchases

Scientific supplies and/or equipment purchases up to \$25,000.00 require one (1) written quotation. Split purchases are not allowed and will not be honored by the Purchasing Department

State Surplus Purchases

Buying surplus equipment from Louisiana Property Assistance Agency (LPAA) may result in savings to the University. The surplus items are located at 1059 Brickyard Lane, Baton Rouge.

Trade-In of University Equipment

Equipment may be used as a trade-in, if solicitation includes trade-in of an existing piece of equipment. No equipment should be trade-in without approval by the Director of Property Management and Director of Purchasing.

Campus Dining Purchases

The University currently has a food service contract with Aramark. To request food services or catering, the end user must obtain a written quote or event sheet from Aramark and submit the document along with a purchase requisition to the Purchasing Department. Open purchase orders are allowed for events being held throughout the fiscal year. The purchase order is emailed and copy is picked up by Aramark staff.

The President and Chancellors have authority to use vendors other than Aramark.

Off Campus Catering

Aramark gives in writing they cannot provide the service
Event is held off campus

Requirements:

Purchase Requisition, Vendor's Quotation, Special Meals Form and Participants' List.
Signed Indemnification Statement

Bookstore Purchases

The University currently has a contract with Follett Bookstore. A purchase order must be processed before receiving merchandise.

Personal Funds Purchases

Employees are authorized to spend personal funds not to exceed \$5,000.00 for supplies and/or services. No type of equipment, computers and related computer equipment, printers, IPads, etc. shall be purchased with personal funds.

Proof (such as bank or credit card statement) of charges made on credit cards or with checks are to be submitted with reimbursement request. Merchandise shall be shipped to the University.

Chemical Purchases

Because of revised guidelines from the Department of Environmental Quality (DEQ) and other Governmental and University guidelines, chemicals can no longer be purchased with personal funds; a purchase order must be done to track the purchase of chemicals.

LaCarte Card Purchases

LaCarte is the Louisiana's procurement card program. This card is provided by the State of Louisiana and Bank of America. It is a credit card issued for official state business. The procurement card helps streamline supplies and services purchases. It is an alternative method to simplify purchases up to \$995.00 without competitive pricing and will replace procurement methods for supplies and/or services. Contact the LaCarte Administrator for training and additional details.

Gift Cards

Gift cards may be purchased for participants of group research projects and are given to the program participants. A participants' list is required.

Donated Equipment

All items of moveable equipment acquired by the University through acts of donation or as gifts become the property of the University and State, except for items donated specially to the Southern University Foundation, which will remain the property of the Foundation. Gifts and donations must be accompanied by documentation from the donor indicating fair market value. Donations will be tagged and recorded as inventory if value is established at \$1,000.00 or more.

Temporary Hires

The State currently has a contract with Westaff, Inc. for temporary personnel services. No individual Westaff temporary employee may work over 680 work hours in a 12 month period. These hours may be worked continuously or intermittently, but under no circumstances may an individual work over this limit.

Printed Contract/Agreement Forms

Printed contracts or agreements from a vendor may only be signed by the President and/or Chancellors. Printed agreements are reviewed by the Purchasing Department before submitting to the President and/or Chancellors.

Employee Purchase Program

When a vendor offers an Employee Purchase Program (EPP), it is posted on the State website-<http://doa.louisiana.gov/osp/epp/epp.htm>. EPP offers a discount and is available to state employees. Use of the program is voluntary and no product is endorsed by the Office of State Purchasing or the Southern University Purchasing Department. This is a personal purchase and must be made with personal funds.

PURCHASE ORDER PROCESS

Purchase Orders are created by the Purchasing Department in the Banner financial system.

Merchandise should not be ordered on a purchase order that has been depleted or closed.

PURCHASE ORDER CHANGES AND/OR CANCELLATIONS

Request for purchase order changes and/or cancellations should be done in writing and approved in advance by the Purchasing Department.

- Letter must include the purchase order number, the reason for change and/or cancellation and the amount to be adjusted
- Merchandise received must be for the specific items listed on the approved purchase order
- Items cannot be substituted
- If you receive merchandise not on the purchase order, you must make arrangements with the Office of Central Receiving to return merchandise
- If merchandise is not available or no longer in stock, and the company has replaced it with another item, the initial item needs to be cancelled and the replacement item is added to the change order.

*VISIT THE BEAUTIFUL CAMPUS
OF
SOUTHERNUNIVERSITY*



Lake Kernan

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