

# Bronx Community College

## Quick Reference Purchasing Guide

### I. PURPOSE

This guide is intended to provide the Bronx Community College community with a brief resource of the purchasing standards and requirements, regardless of the funding source. The resource outlines the key steps and contact information required when procuring goods and services include requisition preparation, funds approval, issuance of purchase orders, payments to suppliers, and follow-up.

### II. GOVERNING REGULATIONS

All general policies related to procurement at Bronx Community College are consistent with official policies mandated by the Board of Trustees of the City University of New York and follow NYS General Municipal Law and the NYC Comptroller's Directives.

**Confirming orders are a violation of the University's procurement policy. A confirming order is an order placed by an end user (Requester) without following the standard procurement cycle which begins with the creation and submission of a CUNYfirst Requisition and the issuance of Purchase Order by the Purchasing Office.**

In the case of an emergency, please contact the Purchasing Office immediately. An emergency procurement is one in which an urgent or unexpected situation occurs where health and public safety or the conservation of public resources is at risk. Pre-approval from the University is required to streamline this procurement cycle. **Casual planning for the procurement of goods/services does not constitute an emergency.**

### III. CONTACT INFORMATION

The Procurement Office can be reached by phone at 718-289-5801 or by email at [Purchasing@bcc.cuny.edu](mailto:Purchasing@bcc.cuny.edu). Other Important Procurement Contacts.

Team Member	Title	Email Address
Kelema Bradford	Finance Procurement Director	<a href="mailto:Kelema.Bradford@bcc.cuny.edu">Kelema.Bradford@bcc.cuny.edu</a>
Nelda Alvarez	Finance Procurement Specialist	<a href="mailto:Nelda.Alvarez@bcc.cuny.edu">Nelda.Alvarez@bcc.cuny.edu</a>
Pura Ruth Rodriguez	Assistant Purchasing Agent	<a href="mailto:Pura.Rodriguez@bcc.cuny.edu">Pura.Rodriguez@bcc.cuny.edu</a>
Luz Matos	Business & Data Reporting Analyst	<a href="mailto:Luz.Matos@bcc.cuny.edu">Luz.Matos@bcc.cuny.edu</a>
Jenessa Polynice	CUNY Office Assistant	<a href="mailto:Jenessa.Polynice@bcc.cuny.edu">Jenessa.Polynice@bcc.cuny.edu</a>
Kiara Lopez	Procurement – Hourly	<a href="mailto:Kiara.lopez@bcc.cuny.edu">Kiara.lopez@bcc.cuny.edu</a>

### IV. PROCUREMENT ROLES

Role	Function
Requester	Makes Request for an item or service
Creator	Makes a request on behalf of another Requestor
Approver	Approves request for item or service

CUNYfirst Procurement Access Form - [Purchasing – Bronx Community College \(cuny.edu\)](https://www.bcc.cuny.edu/purchasing)

## V. GENERAL POLICIES

The Procurement Department has the primary function and sole authority to obtain all necessary goods, services and supplies for the various BCC departments. Only Procurement can obligate the College on matters of procurement through the issuance of duly authorized purchase orders. The Procurement Department strives to obtain quality goods and services, at the best price, within a reasonable time, in the needed quantities, from the most responsible vendor while maintaining the highest levels of professionalism, integrity, and ethics. The Procurement Department adheres to and applies professional standards and ensures that all purchases are in compliance with the University's guidelines and The City and State of New York's laws and regulations.

Deans, Department Chairs, Directors, and Managers are responsible for planning and prudently requesting supplies, services or equipment needed to advance their business operations. It is important to bear in mind that turnaround time on purchase orders is often not controlled by the Procurement Department. There are multiple mandated steps and approvals required. Requests should always be made as early as possible to allow for due diligence on the part of Procurement staff regarding source, quality and price of items sought. To the extent possible, comprehensive functional specifications should be provided to allow for meaningful comparisons.

Planning should begin long before the actual procurement documents are prepared. Determination of funds available from the Budget Office must precede any initiation of an actual purchase requisition. The procurement process begins with the completion of the College's official purchase requisition through the CUNYfirst e-procurement system by the requesting unit.

A purchase requisition must be filled out in advance of all commitments of expenditures except for (1) Travel reimbursement requests and (2) Postage and mailing requests.

It is not acceptable to divide or split purchases to avoid or bypass required approvals or the procurement process.

## VI. CATEGORY CODES

Category codes provide a structure for standardizing purchasing for consistency, efficiency and economy. These category codes, are based on professional standards and ensure proper processing, reporting and accounting of goods and services. Category codes are also instrumental in budgeting review and funding allocation and forms the basis for future funding decisions. Requestors should take great care in selecting the most appropriate code.

## VII. SPECIALIZED COMMODITIES REQUIRE ADDITIONAL APPROVAL

**Computer Hardware, Software and Cloud Services**<sup>1</sup> procurement requires specification approval by the BCC Office of Information Technology (BCC OIT), which should be involved in the preparation of technology-related acquisitions at the earliest possible stages of specification determination. Users should define and understand their functional specifications, and not be guided by a particular product or software. The BCC Technology review may include the following areas: data availability, functionality, security, storage, training, maintenance, support, and licensing implications. No requisitions for computer-related hardware, software or cloud services will be acted upon by the Procurement Department until approved by the BCC OIT.

**Furniture** acquisition requires review and approval of the Department of Campus and Facilities Planning. No requisitions for furnishings will be processed by the Procurement Department without approval of Campus and Facilities Planning. Furniture projects proposing changes in use or layout should be reviewed with Campus and Facilities Planning prior to any submitting requisitions. For items that are requested as part of a reasonable accommodation, pre-approval is also required by Diversity, OSHA and HR.

**Equipment** – Equipment replacement requires planning, coordination and funding. Requests for particular equipment replacement should be made in writing to the VP for Administration and Finance and the AVP for Campus Operations before funding, scheduling or grant applications are made and before a requisition is submitted.

**Capital Improvements** and/or any acquisitions involving renovation, repairs to facilities, interior or exterior improvements to facilities require initial consultation with Campus Facilities, which must approve any requisitions related to such improvements.

**Printing** – BCC has convenience copiers located throughout the campus and an onsite print shop that provides specialty printing and copies. Requests for additional copiers can be directed to Campus Support Services/ Frank Giglio (ext. 5610). The Duplicating Request System (DRS) should be used for all copy jobs, mail merge or mass mailings of more than 50 pages. Access DRS through the BCC website or by following the system link (see below). Log in using your Bronco ID (firstname.lastname@bcc.cuny.edu) and Password and submit and track your print requests electronically. Print jobs can be delivered on campus directly to your workspace. Marketing materials, mass mailings and promotional items require additional approvals, including Communications and Marketing and Legal. For external printing, CUNY procurement policy requires competition for any purchase in excess of \$20,000 and limits contract terms to two years. Procurement is required by law to keep samples of the printed product(s) in the procurement file for inclusion with the voucher (request for payment) and for audit purposes.

**Emergency Purchases** – A declaration of emergency must meet the legal requirements to be classified as an “emergency” for the purpose of procurement, and the emergency declaration must be initiated by the Vice President of Administration and Finance. University policy recognizes states of emergency in only the rarest of circumstances, and declarations of emergency usually require the Vice President’s consultation with the University’s Office of Legal Affairs.

**BCC Catering and Food Services Policy** – The campus is in the process of revamping the catering vendors for onsite catering. To place an order, first contact Special Events by email, [SpecialEvents@bcc.cuny.edu](mailto:SpecialEvents@bcc.cuny.edu), at least 14 days before the event or meeting is to occur, and then enter a purchase requisition into the CUNYfirst or E-business system. All food orders must conform to Directive 6 guidelines which allows for a per person rate of \$13.50 for a modest meal and \$8.50 for light refreshments. A meeting agenda and sign in sheet are required to be submitted and maintained with the procurement file.

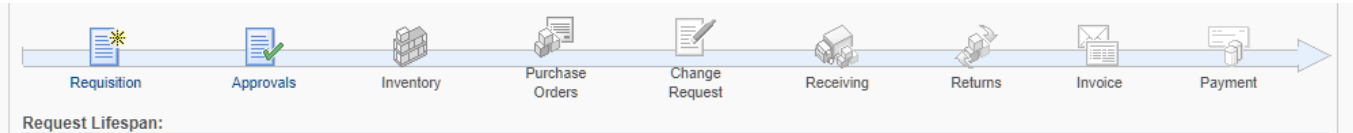
**Office Supplies** - To obtain general office supplies and business items that are covered under the New York State Contract, employees should utilize the system link below which allows registered BCC Associates to place orders online for a wide variety of items for the faculty and staff in their department. Registered Associates can access the Link to research and order supplies from either the search function or the specialized shopping lists created for BCC users. For the name(s) of your department’s Associate(s), please contact the appropriate Division Agent for your area:

## VIII. TRANSPARENCY AND THE PROCUREMENT LOBBYING ACT

Communicating with the vendors is discouraged and is restricted during the procurement process to ensure a level playing field for vendors and to avoid attempts to influence a procurement. CUNY policy and legal mandates require all employees record and maintain documentation regarding certain communications between vendors and their representatives (see Project Sunlight resources).

## IX. GENERAL PROCEDURES

Procurement tracking



PERFORMED BY	ACTION TO BE TAKEN
Requisitioner	Document business process, need and functional specifications. Obtain the approximate price of items or services desired by reviewing past purchases, consulting catalogues, reviewing requirements with prospective vendors for a preliminary cost estimate only, or contacting the Procurement Department via email (preferably) or telephone.
Requisitioner	Prepare acquisition electronic purchase requisition.
Requisitioner	Forward electronically for review and budget approval.
Procurement	Review the requisition for compliance with approval requirements, accuracy and completeness. Every effort is made to identify a SDVOB or MWBE vendor source.
Procurement	Determine appropriate procurement procedure to be followed and assign the requisition to a purchasing agent. The purchasing agent determines whether a requirements contract or other existing contract may be used for the acquisition, or if bidding is required. Mandated procedures are followed and a purchase order is issued. If there are substituted items, requisitioners are notified.
Requisitioner	<b>In a timely manner, periodically check “Manage My Requisitions” in CUNYfirst to view the current status of a request.</b>
Requisitioner	Review the purchase order upon issuance, checking it against the retained copy of the requisition, ensuring accuracy of detail, consistency with expected impact on the departmental budget, and all other relevant information. Contact the Procurement Department immediately if cancellation or modification is required.

Requisitioner	Upon receiving supplies and/or equipment, whether delivered through Receiving and Stores or by direct shipment from the vendor, sign the appropriate receiving documents, authorizing payment through the Accounts Payable Department.
All	Ensure all items are appropriately added to the BCC inventory and annual re-inventories are taken. Ensure every effort is made to guarantee delivery in the fiscal year of order.

## Standard Procurement Methods

### CUNYBUY

CUNY recently embarked on a transformative procure-to-pay project to enhance and streamline our procurement and accounts payable functions. This project is jointly led by key members of the Central Office Procurement Team, University Office of Budget & Finance, Office of the General Counsel, Computing & Information Services, and Campus Representatives. Our primary project goals are to:

- Leverage global and CUNY-specific best practices to **deliver a user-friendly solution** that will facilitate greater collaboration, utilization, and support within CUNY
- **Streamline and simplify procure-to pay business process requirements**, including vendor management, purchasing and accounts payable
- **Create transparency through a unified, accessible platform** for both CUNY users and the vendors

Name of Procurement Method	Conditions for Use of Various Procurement Methods
Sole Source	This procurement method is used when there is no doubt that only one vendor can supply the item or service needed. Sole source selection must be fully documented and requires external (city/state) approval and advertisement.
Single Source	This procurement method is used when competition exists, but one vendor clearly represents the best possible source based on a range of factors. Single source selection must be fully documented and may require external (city/state) approval or advertisement.
Request For Information (RFI)	This procurement method is used when general specifications are available but additional information is needed from vendors.
Request For Quotation (Informal) (RFQ)	This procurement process is used when functional specifications are known and price is the only determining factor. While it is competitive, it involves less-complex, lower dollar value (under \$100,000), often, one-time purchases, and quotes are submitted electronically.
Invitation For Bids (Formal) (IFB)	This procurement method is used when you can define the functional specifications needed and price is the only determining factor; more formal than the RFQ process, it is generally reserved for more complex, higher dollar valued projects and it employs Competitive Sealed Bids.
Request For Proposal (RFP)	This is the most formal of the "Request For" processes and has strict procurement rules for content, timeline and vendor responses. It is used when you can define the functional specifications needed to solve the problem, the quality of the solution is important and the procurement decision is not to be based solely on the lowest bid.

## X. RELATED RESOURCES

### **Comptroller's Directive #6**

<https://comptroller.nyc.gov/wp-content/uploads/documents/Directive-6-Travel-Meals-etc..pdf>

### **Standards for Internal Control in New York State**

[http://www.osc.state.ny.us/agencies/ictf/docs/intcontrol\\_stds.pdf](http://www.osc.state.ny.us/agencies/ictf/docs/intcontrol_stds.pdf)

### **A Guide to the Capital Budget - Independent Budget Office**

<http://www.ibo.nyc.ny.us/iboreports/understandingthebudget.pdf>

### **CUNY Project Sunlight**

<http://www2.cuny.edu/about/administration/offices/legal-affairs/project-sunlight/>

## XI. SYSTEM LINKS

### **CUNYfirst**

[https://home.cunyfirst.cuny.edu/oam/Portal\\_Login1.html](https://home.cunyfirst.cuny.edu/oam/Portal_Login1.html)

### **E-Procurement**

<http://ebusiness.cuny.edu/>

### **Print Requests**

<https://www.bcc.cuny.edu/DRS/logon.aspx?ReturnUrl=%2fDRS%2fdefault.aspx>

### **Office Supplies**

<https://proftech.ediversitynetwork.com>

### **CUNYBuy**

<https://www.cuny.edu/about/administration/offices/procurement-services/cuny-buy/>

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<sup>1</sup> Services made available to users on demand via the Internet