GOALS

- Ethics / Conflict of Interest
- Procurement Responsibilities
- Procurement Methods / Thresholds
- Competitive Procurements
- Professional Services
- Maintenance / Leases / Loaned Equipment
- Construction
- Special Processes
- Review of Forms
- List of Contacts
Ethics = honesty, personal values
- moral principles that govern a person's or group's behavior

Conflict of Interest = relationships
- a situation in which a person or organization is involved in multiple interests (financial, emotional, or otherwise), one of which could possibly corrupt the motivation of the individual or organization. Common at NMIMT is vendor relationships
PROCUREMENT RESPONSIBILITIES

- Vendor Database Management
- Issue Bids (ITB) and Proposals (RFP)
- Issue all Purchase Orders (PO) and Change Orders (CO)
- Sales Tax Questions
- Procurement Card and Gas Card
- Review of Contracts / MOU’s / MOA’s
- Files
SERVICES HANDLED BY OTHER DEPARTMENTS

- Reimbursements (AP)
- Invoices (AP)
- Direct Payments (AP)
- Property
- Student Services
- Employee (HR)
PROCUREMENT METHODS

- Procurement Card / Gas Card < $999.99
- Direct Payment < $4,999.99
- Purchase Orders $5,000 and above
  - $5,000 - $19,999.99 – one written quote
  - $20,000 - $59,999.99 – three written quotes
  - $60,000 and above – Bid or Proposal
- Any computer over $1,000
FUNDS

- State
- Federal
- All monies once in NMT’s bank must be spent according to state and federal guidelines
- Tax exempt, with exceptions
- Prepayments
- Unallowables
LEGAL STUFF

- New Mexico Statutes Chapter 13 Annotated 1978 (NMSA)
- New Mexico Statute 10-16 (GCA)
- Federal Acquisition Regulation (FAR)
- Office of Management & Budget (OMB)
- United States Code (USC)
- Internal Revenue Service (IRS)
COMPETITIVE PROCUREMENTS

- **Bids (ITB)**
  - Over $60K
  - Lowest price is deciding factor as long as goods / services meet specifications

- **Request for Proposal (RFP)**
  - Over $60K
  - Other factors, besides price, are taken into consideration (references, experience, ability to meet specifications, etc.)
COMPETITIVELY BID CONTRACTS

- **General Services Administration (GSA)**
  https://www.gsaadvantage.gov/advantage/main/start_page.do

- **State Purchasing Department (SPD)**
  http://www.generalservices.state.nm.us/statepurchasing/

- **Western States Contract Alliance (WSCA)**
  http://www.aboutwsca.org/#/home/contracts

- **Cooperative Educational Services (CES)**
  http://www.ces.org/

- **E & I**
  https://www.eandi.org/Default.aspx?
PROFESSIONAL SERVICES

Prior to hiring the professional:
- Vendor form is mandatory, if not in Banner or if information is old
- Decisions on tax withholding and 1099 reporting are made off the vendor form and W-8
- Use Professional Services Agreement (PSA) when hiring the following:
  - Attorney
  - Accountant
  - Doctor / Dentist
  - Engineers / Architects
  - Management Consultants
  - Researchers
MAINTENANCE, LEASES, LOANS

- Need to be on a purchase order
- At the end of the lease period of copier
  - Purchase equipment at FMV
  - Return to company
  - Extend for another 12 months
- Loaned equipment
  - Protection for both parties
  - Cannot keep equipment
CONSTRUCTION

- Departments should consult Facilities Management first
- Full blown construction
  - Wage rates
  - Bonds
  - Insurance
SPECIAL PROCESSES

- Unauthorized Purchases
- Change Orders vs. Encumbrance Release
- Emergency Purchases
- Used Items
- Sole Source
- Regents
  - Notify them of any purchases exceeding $100K utilizing federal funds
  - Approval for all purchases exceeding $250K utilizing state funds
FORMS

- Vendor Form
- Change Order Form
- Various Procurement Card Forms
- Professional Services Agreement
- Requisitions
- Sole Source
- W-9 / Tax Exempt Information
- http://www.nmt.edu/purchasing-services-forms
FORMS
CONTACTS

- General email: purchasing@admin.nmt.edu
- Associate Director / Temporary Procurement Card Admin:
  - Richard Hildebrandt, x5164, rhildebrandt@admin.nmt.edu
- Purchasing Manager:
  - Joyce Chavez-Sandoval, x5874, jychavez@admin.nmt.edu
- Buyer II:
  - Linda Gonzales, x5886, lgonzales@admin.nmt.edu
- Vendor Database Manager:
  - Darlene Torres, x5885, dtorres@admin.nmt.edu
- Bids / RFPs, and general know it all, Chief Procurement Officer:
  - Kimela Miller, x5881, kmiller@admin.nmt.edu
QUESTIONS

- www.nmt.edu/purchasing-services
- purchasing@admin.nmt.edu

THANK YOU FOR ATTENDING