

How To order > \$10k and Sole Source

<https://mse.engin.umich.edu/internal/howto/how-to-order-10k-or-greater-or-sole-source/view>

U of M Procurement Process for Purchasing Equipment and Services

Equipment and services can be sourced through M-Marketsite and strategic contracts. The University has already negotiated pricing and terms for these areas. Quote to Order (QTO) offers estimates from multiple strategic suppliers.

M-Marketsite: <http://procurement.umich.edu/buying/buying-methods/m-marketsite>

M-marketsite is the university's online catalog ordering system where faculty and staff can place orders from many different suppliers.

Strategic contracts: <http://procurement.umich.edu/buying/buying-methods/strategic-contracts>
<http://procurement.umich.edu/buying/find-products-services>

To help contain costs and reduce expenses, Procurement Services has awarded contracts that are open for use by all authorized faculty and staff.

Quote to order: <https://mbiz.bf.umich.edu/qto/>

Quote to Order (QTO) is a web-based portal designed to help faculty and staff obtain estimates from multiple strategic suppliers based on available commodities currently in the QTO website.

U of M Bid process for Purchasing Equipment and Services over \$10,000.00

The University of Michigan procurement office located at Wolverine Tower is responsible for processing all bid requests and requisitions over \$10,000. Department staff do not have the authority to negotiate on behalf of the University.

Contact procurement services at the beginning of the process to investigate suitable equipment and suppliers for a department project. Your specifications and prospective suppliers can be submitted to procurement. Procurement will send a formal bid document using those specifications to the suppliers who have been identified. Once the procurement office has initiated the bid process, all communication goes through procurement. By using the bid document, suppliers can submit questions and receive responses regarding the specifications. As this is a business transaction between the University and the suppliers, issues such as agreeing to the UM terms and conditions are handled through the bid document.

When sending bid documents to suppliers, the fund source must be identified. When using federal funds, specific language is required in the bid document. For purchases using federal funds over \$250,000.00, Uniform Guidance rules apply. If a grant or contract number begins with the letter F, it is federal funds. <http://procurement.umich.edu/search/node/uniform%20guidance>

Any supplier quotes that have been sent to the department are used as a guide by procurement. These quotes are never used to issue a purchase order. A formal bid document from the University must be completed and returned to procurement.

When the suppliers submit their bid response, the information from multiple bidders is sent to the department for review. Departments may ask for additional information or select a supplier. The department is required to send their comments describing the selection process to procurement. Once a selection is made, a requisition is created for the selected supplier.

U of M process for Purchasing Equipment and Services > \$10,000.00 as a Sole Source

To sole source a purchase there must be compelling technical reasons to exclude all other suppliers.

Are there specific research requirements that can only be met by one supplier?

Specifications including technical requirements and intended use must be provided.

Are there specific software requirements?

Can these requirements be documented and supported by data? Website addresses do not qualify; the information must be included or attached.

What are the technical differences between the features provided by your preferred supplier and other suppliers that have been investigated?

Due diligence should be objective and not subjective. Use quantitative values where possible.

In the event equipment does qualify for the sole source process, procurement will still send a formal bid document to the supplier.

Any supplier quotes that have been sent to the department are used as a guide by procurement.

These quotes are never used to issue a purchase order. A formal bid document from the University must be completed and returned to procurement.

Sole source form for campus: <http://procurement.umich.edu/about-us/forms>

- **Download from link in your online purchasing system (OPS) request named 'sole source form' DO NOT select (HCP) sole source justification form**
- SSJ FORM needs to be completed by lab personnel and signed by Advisor / Faculty
- SSJ FORM must be complete, all questions answered, due diligence provided in detail before it can be accepted by procurement.

Procurement Services is available to meet with the lab staff.

Procurement contacts: <http://procurement.umich.edu/about-us/contacts>

This is a list of all the procurement teams at Wolverine Tower.

The research team handles equipment and services: procurement.research@umich.edu

Emails can be sent to the group address.

Procurement Agents generally assigned to Engineering are:

Sue Knight	scknight@umich.edu	734 763 4332	\$10,000 to \$100,000.00
Jim Kozich	jamesjko@umich.edu	734 615 0515	\$10,000 to \$500,000.00
Sandra Romanchuk	sandralr@umich.edu	734 763 9393	\$100,000 and up

FROM THE SUPPLIER

1. Who are ALL the suppliers that might supply this equipment?
2. Who is the sales representative or supplier contact?
3. What are the phone numbers of sales representatives?
4. What are the emails of sales representatives?

FROM YOUR LAB

1. What is the type and intended use of equipment you want purchased?
2. What are the specifications for this equipment? Be as detailed as possible and list out separately.
3. What is the time frame for delivery of the equipment?
4. What type of warranty or service plans are you looking for from potential suppliers?
5. Is software required to run the equipment, a specific type?
6. Quantity to be purchased?
7. Will installation be required?
8. Will training be required? If so, how many days needed for training?
9. Who is the technical contact for your lab?
10. Who in your lab will take delivery of equipment? Lab to communicate with Keith McIntyre
khm@umich.edu 734 763 7893
11. How much time will be required to inspect equipment at time of delivery?
12. Will Federal funds be used to pay for the equipment? Provide project grant or contract number.
13. Lab location: undergoing renovation? confirmed completion date? equipment weight acceptable?
14. Delivery to lab location-require rigging, does truck need lift gate for dock, accept semi-trailer, is dock attended?

Now that you have gathered all this information, upload into your online purchasing system (OPS) request and route for approvals @ <https://deptapps.engin.umich.edu/order/index/newform?dept=221800>

Additional Resources regarding procurement

Procurement website: <http://procurement.umich.edu/>
<http://procurement.umich.edu/about-us>

Buying: <http://procurement.umich.edu/buying>

Process and Policies: <http://procurement.umich.edu/buying/process-policies>

Procurement Policies SPG 507.01: <http://spg.umich.edu/policy/507.01>

FAQ: <http://procurement.umich.edu/buying/faq>

Restricted Commodities List <http://procurement.umich.edu/buying/process-policies/restricted-purchases-special-approvals>

Uniform Guidance Rules Apply to Federal Fund Purchases over \$250,000.00
<http://procurement.umich.edu/search/node/uniform%20guidance>

http://procurement.umich.edu/sites/default/files/uniform_guidance_exec_presentation_07_09_2018_v4a.pdf

Conflict of Interest: <https://research-compliance.umich.edu/conflict-interest-coi>

Employees must disclose any interest in suppliers that do business with the University prior to any purchases. This requires regental approval, which may take several months. University of Michigan Regents meet eight times a year.