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# The REQUISITIONER

## Newsletter

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**Procurement and Contract Services Issues of Interest to GSU Faculty and Staff**  
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### OUR MISSION

The mission of the Georgia Southern University Department of Procurement and Contract Services is to provide University departments with customer oriented procurement and logistics services necessary for their effective and efficient support of the University's mission. We encourage departments to use the guidance and information provided on our web site located at <http://services.georgiasouthern.edu/procurement>

### Comments By George

Just as we think we have unlocked the success secret for "year end" we find more challenges awaiting us. Hopefully, allowing the departments to use their procurement card longer helped departments with year end spending. There are still some challenges associated with placing orders in June and having the materials here for the beginning of class in August. Some of these challenges are beyond the University's control and are simply an issue of placing orders with vendors too late and given the increase in orders, they often become backlogged with the manufacturer. Keep in mind that other universities and schools use many of the same vendors that we use routinely.

Prior to year end we completed the conversion to "WORKS". This was a challenge for us and especially each of you. It was a major undertaking and we sincerely appreciate the patience and cooperation shown during this process. We hope that the reporting capabilities associated with this program offer you a new management tool.

With little fanfare the name of the department changed from Materials Management to Procurement and Contract Services on July 1<sup>st</sup>. The old department title was more indicative of a purchasing office in a private sector manufacturing company. We felt the new title better described the services we strive to provide.

On the personnel front, we had a number of changes. Ms. Maria Burton was hired as the new Receiving Clerk replacing Keith Bedgood. Ms. Federica Lanier was hired as a Procurement Specialist and Ms. Brenda Crews was hired into the newly created Clerk position. Mr. Chris Wright, our Procurement Assistant who worked with the P-Card left the department to work in Food Services. We have reclassified Chris' position into a Procurement Card Administrator position and are currently in the hiring process. Mr. Jimmy Roberts in Central Receiving returned to work in September after a five month absence due to rehabilitation from an automobile accident. We are fortunate to have him back. Ms. Joya Bady (Sabb) in Central Stores left the University effective the end of October to join the Armed Forces. We wish her well. Finally, we congratulate Ms. Chandra Cheatham in Purchasing on earning her Bachelors degree in Information Technology, a milestone achievement.

This upcoming fiscal year will present a number of challenges especially for our Purchasing Section. State Purchasing in Atlanta is undergoing a *Purchasing Transformation Initiative* as a

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## Comments By George (cont)

result of the Commission for a New Georgia which is producing a number of changes in the way we do business, business procedures and a multitude of changes in our statewide contracts. A separate article goes into more detail on this.



Finally, we would like to dedicate this edition of the *Requisitioner* to Lynn Fail, one of our Procurement Specialists. Lynn passed away on November 25<sup>th</sup>. Lynn epitomized success within an organization. She worked at Georgia Southern from 1989 through 1994 including a period as Procurement Assistant in Materials Management. After taking an absence of one year, she returned to the University in 1995 and to Materials Management in May of 2001 as a Staff Assistant. In December 2003 an opportunity presented itself and Lynn applied for and was selected for the

Procurement Assistant position in the Purchasing section. Shortly thereafter she was promoted into a Procurement Specialist's position. She worked on two different teams gaining experience in a wide range of commodities. Her first large project was establishing the successful janitorial supplies contract currently used by three different campus departments. She also contributed to this newsletter on more than one occasion. Lynn was an excellent, dedicated worker and team player, a role model for all of us to follow.

*George A. Horn*

## Furniture Purchases - Where Do I Start?

Recent procurement card audits indicate there may be some confusion regarding departmental spending authority and furniture purchases. The State of Georgia has established many statewide contracts all of which, except one (Grainger MRO), are mandatory. The furniture contracts are mandatory use contracts meaning that they must be used unless the item desired, or a reasonable substitute, is not available. Departments using their spending authority (up to \$3,000 per transaction) to purchase furniture should look to these contracts as a first source. It might be surprising that these contracts include items like lab stools and some other laboratory furniture, not just office furniture.



It is strongly recommended that you contact John Oglesby at 5629 if you are in the market for furniture. He can assist you in identifying sources either from the statewide contracts or other sources. The advantage to these contracts is better pricing (often 40%), commercial grade quality and a better ability to work with the vendor in case of problems.



## New Statewide Asset Management Program

A new Asset Management Program (AMP) is being developed by the Department of Administrative Services. Initially the focus will be on vehicles and will include not only an inventory of vehicles at each agency/university but will also track mileage, fuel and maintenance costs and provide for an online system for requesting approval to purchase, lease or accept donations of vehicles. Hopefully this new system will expedite the approval process. A specific date for implementation is not yet available, but we expect this to occur fairly soon. Mr. Sidney Reynolds in Property Control is the University's Vehicle Coordinator and most of the efforts of this system will fall under his purview. Procedures will be developed for obtaining required input from departments and updating this system once more details are known and this information disseminated to the campus.

## Contracts - Who Handles What?

There are a number of departments on campus which have contracting authority, so who does one go to, for what type of contract? While there are always “gray areas” the guidance listed below should help you with which department to start with. This listing is not all inclusive, but these departments work closely together and can direct you to another department if necessary. Further, Legal Affairs and Procurement & Contract Services reroute contracts after review and discussion when and if appropriate.

### Physical Plant

Plant contracts (generally repair or renovation of buildings, grounds, infrastructure and utilities)

New construction contracts

Architecture and Engineering consultants

Professional service contracts such as Surveyors

### Controllers Division

Banking Contracts

Insurance

### Procurement and Contract Services

Purchase of goods and services not covered elsewhere

### Legal Affairs

Lecturers and entertainers

Commercial Sponsorships

Intellectual Property

Real Estate transactions (including leases)

Contracts involving cooperative organizations

Revenue contracts

Software licenses where no purchase is involved

Technology and Intellectual Property transfers

Grants and service contracts as referred by ORSSP

Cooperative Memoranda of Understanding with other institutions and agencies

## Procurement Card & WORKS News

The start of a new year on campus is always a welcome and exciting adventure. As you have already read in the “Comments by George”, Chris Wright who was handling the Procurement Card and WORKS programs, has left for a position in Food Services. We wish him well. So, once again, these programs are administered by Sheryl Lewis. She was a part of the implementation team with the Procurement Card Program in 1997 and the WORKS program in 2005.

As always, we thank the campus community for the support and success of this program. The procedures are available on our website at: [http://services.georgiasouthern.edu/procurement/purchase/web\\_page\\_procurement\\_card.doc](http://services.georgiasouthern.edu/procurement/purchase/web_page_procurement_card.doc) . Your continued use and timely processing of both the on-line (WORKS) and paperwork portion is greatly appreciated. Should you need refresher information on any of the deadlines or procedures, contact Procurement & Contract Services ext. 5661.

Financial Accounting would like to offer the following information regarding transactions using accounts 75\*\*\*\* and 64\*\*\*\*. These accounts must be tracked by a continuous audit, i.e., we must report these items to the state by person or vender. The information necessary for this in PeopleSoft journals is tracked by use of the description line, where we would enter the name and FEI number (format for this is as follows: \*CA\*123456789\*J. Doe). VISA/WORKS does not give us the flexibility to enter and maintain this information. If a check is cut through AP, the necessary information is automatically tracked. As a result, the P-Card will **not** be used for transactions that will be paid utilizing either of these two account numbers.

## Wright Express Fuel Card & Roadside Assistance Issues



Four issues have come to our attention recently and are provided for your information.

Personal Identification Numbers are assigned to an individual and are not transferable. We had an instance where gasoline was charged to a PIN for an individual who was no longer employed at the University. We had to do a little “research” to determine who had used the card. When an employee leaves the University or transfers we ask that the Department Head notify Central Stores at 681-5226 so that the PIN can be inactivated. A new Fuel Authorization form can be submitted for any replacement personnel needing to purchase fuel with the Wright Express card. This becomes important when you loan your vehicle to another department for use and want a means to identify who purchased gasoline or services for reimbursement to your department’s funds.

We have had instances where vehicles were loaned out or otherwise put on the road without the Wright Express card in the vehicle. The Wright Express card is assigned to the vehicle and is the primary means of obtaining gasoline and services including roadside assistance in some areas while on the road. Not having the card available could put a University traveler in jeopardy. We urge all departments to ensure that the cards are in the vehicle when it is in use and especially when used for out of town travel. Further, you should ensure that any traveler using the vehicle has an assigned PIN so that the card may be used.

We have contacted Wright Express regarding roadside assistance for our travelers. They have indicated that roadside assistance services are available by calling **888-939-8697 (888-WEX-TOWS)**.

We have had calls stating that you were unable to refuel at the on campus fuel station. When we responded we noted that your vehicle was due for service and was therefore being refused fuel at the station. Most importantly from a safety standpoint, we urge you to keep your vehicle maintenance current.



### Georgia Southern University Logo

The Purchasing Office has received requests to pay for miscellaneous advertising or promotional type items using the official Georgia Southern University logo. All use of the official logo on products should be approved through the Office of the Vice President for Business and Finance. If your College or department wants to use the official logo, please make sure you are using the logos correctly and are supplying vendors with the appropriate art for the application.

For the most part, colleges and departments should not be creating or using secondary logos. There are, however, exceptions and these are generally approved for units that have a public outreach, for example, the Museum or the Botanical Gardens, retail units from Auxiliary Services, restaurants and a couple of very specialized departments on campus. Academic departments should not be using secondary logos. All requests for use of a secondary logo must be approved by the Director of Marketing and Communications.

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## **I Have A Contract - Now What?**

You had a recurring need for services such as room cleaning or laboratory testing services. You went through the bidding process and now have a contract in place. So....Now What?

Each department that has a contract issued on its behalf becomes the Procurement Office's representative for that contract. The Procurement office does not have day to day contact with the vendors and therefore relies on the departments to perform the following functions:

- Oversight of the contractor's performance. Did they clean in accordance with required procedures? Did they submit test results in the proper format?
- Oversight of the contractor's adherence to rules, terms and conditions of the contract. Did their employees wear required visual identification cards? Are they authorized to work on weekends?
- Scheduling of services with the contractor.
- Documenting and reporting of problems to Procurement in a timely manner. Problems are more difficult to correct the longer they go unreported.
- Notify procurement of required changes to the contract. No contract is perfect and there are always opportunities to change or modify the contract. Let's make sure we do it right and get it in writing and agreed to by all parties.
- Verification of invoices. Departments should have a copy of the contract including the pricing. Contractors can make mistakes so each department should check the invoice carefully and make sure: 1) the services were actually performed as indicated and 2) that the correct price is being charged. It's your money!

List the Contract Number on Invoices, Purchase Requisitions, etc. used to execute the payment of the charge.

Hardline approach? Actually, no. The preference for supplier management is to develop a partnership. All of the above including problems and resolution can be accomplished by working together with the contractor and Procurement. That is why early notification is most important.

## **Purchasing Goods or Services**

Information you will find useful when purchasing goods or services:

State Purchasing regulations prohibit awarding a purchase to a Vendor that is not registered with the State of Georgia and listed in the Georgia Procurement Registry System. This means that all Vendors, in order to sell goods or services to Georgia Southern University, need to log into the State of Georgia Purchasing web-site and proceed with registration at <http://statepurchasing.doas.ga.gov>

The Vendor Registration System is a free, web-based system provided by DOAS State Purchasing that enables vendors to register their company and identify product and service offerings. State and local governments can search the Vendor Registration System by commodity, service, geographic location, and small or minority business status to locate vendors. The Vendor Registration System will automatically notify vendors by e-mail when related bids and procurement opportunities become available.

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## **Request For Proposal Or Bid**

The two primary competitive methods of obtaining services are by a Request for Proposal (RFP) or a bid/quote. Which one you use depends on a number of factors. The differences between the two methods and some pros and cons are outlined below.

### RFP

- Allows for consideration of factors other than simply price in determining award
- Allows for negotiation after receipt of the proposal
- Requires the use of an evaluation committee and a scoring matrix
- Takes more time to complete than a quote or bid
- Must be sent to State Purchasing as only they have the authority to issue an RFP
- State must agree that the use of an RFP is more beneficial than a bid or quote

### Bid/Quote

- Award is based almost exclusively on low bid with consideration for responsiveness (i.e. meeting requirements) and responsibility (qualified vendor)
- Can usually be done within one month or shorter (dependent upon dollar value) from issuance of bid to award
- Can usually be done locally unless the value is greater than \$100,000 and using E&G funds.

We will be glad to discuss the use of these two purchasing procedures in detail should you have an upcoming solicitation.

## **Used Vehicle or New?**



The question comes up frequently.....Can I purchase a used vehicle? Current policy requires us to request approval for all vehicle purchases. This policy does allow us to request permission to purchase used vehicles. One deciding factor is that the vehicle does not exceed the fair market value of the vehicle as determined by the National Auto Research's "Black Book".

Here's the catch.....If the vehicle costs more than \$5,000 it must be done via the competitive bid, a process that can take three weeks. Then we need to create a purchase order and send it along with the letter request or online request to Office of Fleet Management for approval to purchase. This process has been taking from six to eight weeks. So, by the time we receive the approval back the vehicle may have been sold unless the dealer is willing to hold it for two to three months while we try and get approval. Buying a new vehicle off statewide contract depends upon the production line and not the "on lot" inventory. Please keep this in mind when deciding what to buy.

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## **Procurement Transformation Initiative**

The Commission for a New Georgia indicated the need, amongst other areas, for an overhaul of some of the purchasing procedures used within the State. The State Purchasing Office, in conjunction with the consulting firm A. T. Kearney, is working to identify/revamp various statewide business processes, forms and contracts. An attempt is being made to streamline the process, standardize forms and processes used throughout the State and renew or issue various statewide contracts.

The statewide contracts are being done in phases with the first phase currently underway and consisting of the following contracts: IT Software, Office Supplies, Office Furniture, IT Hardware, Express Mail, IT Staffing, Uniforms, Tractors/ATVs/ Golf Carts, Pharmaceuticals, Travel Services, Office Equipment, Food and Radios. These contracts may require a change in vendor and subsequent conversion from one vendor to another. As these contracts are finalized, information will be sent to the campus via email.

One very positive note is that State agencies and Universities have been invited to participate in developing and evaluating these bids and contracts. Georgia Southern has had representation on the following solicitations: Office Supplies, Tractors/Mowers/ Utility Vehicles/Golf Carts, Express Mail, IT Software.

Georgia Southern University is also involved with the VISA Optimization Initiative which is gathering information and spend data in an effort to improve Bank of America's services to agencies and schools.

## **Why We Need Good Specifications**

When submitting a purchase requisition, make sure to provide complete descriptions of requirements. If assistance is needed, call the purchasing office and guidance will be provided.

By providing accurate, brief and clear specifications, vendors will be able to provide the appropriate products and/or services requested. The buyer can effectively evaluate the product and/or service thus meeting the end user's needs.

## **Useful Web Links**

Listing of Copiers available on Statewide Contract: [http://gta.georgia.gov/02/channel/0,2188,1070969\\_13390704,00.html](http://gta.georgia.gov/02/channel/0,2188,1070969_13390704,00.html)

Vendor Registration: [http://statepurchasing.doas.ga.gov/00/channel\\_title/0,2094,35226973\\_36298624,00.html](http://statepurchasing.doas.ga.gov/00/channel_title/0,2094,35226973_36298624,00.html)

Procurement & Contract Services Website: <http://services.georgiasouthern.edu/procurement/>

Technology Purchases: <http://services.georgiasouthern.edu/procurement/itpurchase/>

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## Spotlight On Vendors

This section will highlight new vendors and vendors who have communicated their interest in doing business with the University. Departments are encouraged to contact these vendors if you have a need for their good or service. Listing vendors does not constitute an endorsement or other recommendation by Procurement and Contract Services.

- ◆ Statesboro Sight and Sound – Statesboro, GA  
912-764-7487  
Mr. Matt Sykes [shts@frontiernet.net](mailto:shts@frontiernet.net)

Reseller of commercial A/V systems, security systems and structural wiring. Brands include Klipsch, Fujitsu, Draper and Matrix Audio and service with Lutron, Samsung, Infocus, Onkyo and Sharp.

- ◆ ShredEx – Savannah, GA  
912-443-9596  
Mr. Corey Jones, President [corey@shredex.org](mailto:corey@shredex.org)

On site shredding of documents and recycling of confidential data.

- ◆ TAP Office Furniture, Co  
866-992-9856  
140 Willingham Drive  
Bolingbroke, GA 31004-0395  
Tim Parker - Owner [tapofficeinc@aol.com](mailto:tapofficeinc@aol.com)

State Furniture Contract Dealer – represents numerous furniture lines

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*Thank you for taking the time to read this newsletter. We look forward to meeting your needs and helping you accomplish your mission. We encourage you to stop by and visit us or, better yet, allow us to visit your departmental areas and meet with you.*

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