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Revised 2/6/18
PROCUREMENT & PAYABLES

PROCUREMENT DEPARTMENT
Vacant                      Director of Procurement & HUB Activities
Heather German            Procurement Specialist I
Tripti Das               Purchasing Assistant

PROCUREMENT & PAYABLES
Debra Carpenter, CTPM   Executive Director of Procurement & Payables
Catina Chapman          Senior Contract Administrator
Patti Bozeman, CTCM, CTPM  Contract Administration Specialist
Alicia Gookin           Senior Staff Assistant

LOCATION: North Office Annex II
PHONE: (281) 283-2150
HOURS: Monday – Friday 8:00 a.m. – 5:00 p.m.
Check out the Procurement webpage. It provides valuable resource information, forms and other helpful sites to aid you with your purchasing related questions.

https://public.uhcl.edu/about/administrative-offices/procurement-payables/procurement/
THE PURCHASING CYCLE

1. Need Defined
2. Procurement Method Selected
3. Solicitation
4. Receipt of Bids
5. Evaluation and Award
6. Inspection and Acceptance
7. Contract Administration
8. Payment
9. Disposal of Property
P-CARDS and VOUCHERS
PURCHASES UNDER $1,000.00

Department should use P-card or pay by voucher unless the vendor is unwilling to invoice, accept a credit card or requires a PO.
WHAT TO INCLUDE?

WHEN ORDERING ITEMS UNDER $1,000.00, DEPARTMENT MUST GIVE VENDOR THE FOLLOWING INFORMATION:

• DEPARTMENT NAME
• UHCL CONTACT
• BUILDING AND ROOM NUMBER
• PHONE NUMBER

This information is necessary for the Receiving Dock to know where items are to be delivered.

The Receiving Dock will require a signature on an electronic tablet. A receiving report will not be issued for these items.
DEPARTMENT APPROVAL

BE SURE TO OBTAIN DEPARTMENTAL APPROVAL AND SUBMIT DOCUMENTATION WITH REQUISITION, VOUCHER OR P-CARD WHEN APPLICABLE.

- **ALL COMPUTER RELATED ITEMS** must have UCT approval before purchase. Send to support center for quote or approval. supportcenter@uhcl.edu
- **ALL EXTERNAL PUBLICATIONS AND PROMOTIONAL** items must have the office of communications approval. Send content to brandguide@uhcl.edu for review
- **ALL TEMPORARY STAFFING** must have Human Resources approval. A TEMPORARY LABOR REQUEST FORM should have appropriate signatures, job title, a list of job duties and bill rate.
- **ALL LARGE EQUIPMENT AND SIGNAGE OR ANY EQUIPMENT THAT HAS ELECTRICAL HOOKUP** must have FMC approval. Includes anything that would attach to building. Send email to Pam Groves groves@uhcl.edu, approval must be uploaded behind your requisition.
- **ANY LAB EQUIPMENT PURCHASE THAT CONTAINS A LASER** must first be approved from the Laser Safety officer, Lisa Coen coen@uhcl.edu, approval must be uploaded behind your requisition.
- **ADS FOR HIRING** must have HR’s approval.
EXCEPTIONS

DEPARTMENTS SHOULD ORDER DIRECTLY FROM THE VENDOR AND PAY FOR ITEMS ON A VOUCHER OR P-CARD IN ACCORDANCE WITH ACCOUNTS PAYABLE GUIDELINES. THE FOLLOWING ARE NOTED EXCEPTIONS.

- BOTTLED WATER DELIVERY
- TIBH ORDERS
- TXMAS CONTRACTS
- A REQUIREMENT BY VENDOR TO PROCESS ORDER
- ORDERS USING STATE FUNDS
- ADVERTISEMENTS
P-CARD USE

- P-CARD SINGLE TRANSACTION LIMIT $1,000.00.
- BE SURE WHAT YOU ORDER AND RECEIVE IS WHAT YOU WANT.
- DEPARTMENTS ARE RESPONSIBLE FOR RETURNING MERCHANDISE AND OBTAINING CREDIT.
- PURCHASING AND RECEIVING DOCK ARE NOT INVOLVED IN VOUCHER OR P-CARD PURCHASES. THE RECEIVING DOCK WILL DELIVERY ITEMS.
- CONTACT YOUR BUSINESS COORDINATOR BEFORE PROCESSING THESE TYPE OF PURCHASES.
- BUSINESS COORDINATOR DETERMINES IF YOUR DEPARTMENT MAY USE A P-CARD.
- CANNOT HAVE ITEMS DELIVERED TO HOME.
Subscriptions

Memberships & Registrations

PAY ON VOUCHER or P-CARD REGARDLESS OF AMOUNT
REQUISITIONS
TIPS FOR CREATING REQUISITIONS

Requisitions should have **no more than 10 lines**. For larger orders, it is best to use “1 Lot” for item quantity. Enter a brief description then list all part numbers and specifications on line comments. Separate by account code.

Computers and Accessories should have **ALL specifications listed in line comments**.

Upload ALL supporting documentation (i.e., quotes, department approvals, ads, emails) before entering into workflow.

Inactivate duplicate documents or internal error messages.

Shipping/Delivery/Labor costs should be on a separate line.
HEADER COMMENTS

USE HEADER COMMENTS TO INCLUDE IMPORTANT INFORMATION SUCH AS:

- REQUESTOR
- POINT OF CONTACT/DEPARTMENT CONTACT
- PURPOSE STATEMENT (IF DEPARTMENT REQUIRES)
- DELIVERY LOCATION AND INSTRUCTIONS
- NEED BY DATE
- VENDOR CONTACT INFORMATION
- ASSET MANAGEMENT (i.e. ASSET LOCATION (BUILDING/ROOM #), EMPLOYEE NAME, DEPARTMENT NAME, DEPARTMENT ID, CONTACT PERSON)
- PO HANDLING INSTRUCTIONS (i.e. CHANGE OF ADDRESS, ADVANCE PAYMENT, ENCLOSURES)
PURCHASE ORDERS

IF YOU NEED TO MAKE A PURCHASE...
PLAN AHEAD
# PURCHASING PROCEDURES

<table>
<thead>
<tr>
<th>Range</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>$0.01 - $1,000.00</td>
<td>Department places orders directly with vendor. Department pays with voucher or procurement card. Procurement will not accept purchase requisitions under $500.00 unless required by vendor.</td>
</tr>
<tr>
<td>$1,001.00 - $5,000.00</td>
<td>Department does requisition. Procurement places order and no bids are required however they have the option to bid.</td>
</tr>
<tr>
<td>$5,001.00 - $25,000.00</td>
<td>Department does purchase requisition. Procurement does informal bid.</td>
</tr>
<tr>
<td>$25,001.00 +</td>
<td>Department does purchase requisition. Procurement does formal bids and places on state ESBD website.</td>
</tr>
</tbody>
</table>

**Federal Funds Only: Bid at $3,000.00**
PO PROCESSING TIME

HOW LONG DOES IT TAKE TO PROCESS A PURCHASE ORDER?

<table>
<thead>
<tr>
<th>Description</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than $5,000 (Call and Place Order)</td>
<td>3 days</td>
</tr>
<tr>
<td>$5,001 - $24,999 (Informal Bids)</td>
<td>5-10 days</td>
</tr>
<tr>
<td>Greater than $25,000 (Formal Written Bids)</td>
<td>15+ days</td>
</tr>
<tr>
<td>posted to Electronic State Business Daily</td>
<td></td>
</tr>
</tbody>
</table>
PURCHASE ORDER FOLLOW-UP

Purchasing will follow up on late orders.

If there is a long delay in delivery, Departments will be notified by e-mail.

Departments are **NOT** to contact vendors unless you have placed an order with a p-card or voucher.

A vendor performance must be submitted to the State on any order over $25,000. Should you have an order exceeding $25,000 you will be sent a Vendor Evaluation Form to complete and return to Purchasing.
Vendor Evaluation Form

Please help Procurement evaluate your recent order by providing feedback. Responses will be used to connect vendors with exceptional service and identify any performance or delivery-related issues. Feedback will be posted to the Centralized Masters Bidders List to enhance vendor performance.

Purchase Order:
Vendor:
Description of Goods or Services:
Form submitted by:

PERFORMANCE
1. Were there any performance issues?
   - None
   - Failure to replace damaged goods
   - Failure to pick-up incorrect shipment
   - Poor product quality
   - Poor customer service
   - Unauthorized substitution
   - Unacceptable installation
   - Failure to respond to letter, phone call, or email
   - Incorrect invoice
   - Other ________

2. Did the vendor provide exceptional service? Please explain.

DELIVERY
2. Were there any delivery issues?
   - None
   - Late Delivery
   - Failure to Deliver

4. Was the vendor notified of delivery issues?
   - Does not apply
   - Yes
   - No

5. If yes, how were they notified?

RESOLUTION
Please enter at least one resolution code for the delivery or performance issues selected above.

6. How were the delivery/performance issue(s) resolved?
   - Does not apply
   - Satisfactorily resolved
   - Unsatisfactorily resolved

RATING
5. Overall, how would you rate the vendor?

<table>
<thead>
<tr>
<th>VENDOR UNSATISFACTORY</th>
<th>SATISFACTORY</th>
<th>EXCELLENT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delivery</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Product/Service</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Performance</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Item met Specifications</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Customer Service</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Response Time</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Invoicing</td>
<td>☐</td>
<td>☐</td>
</tr>
</tbody>
</table>

COMMENTS
9. Please include any relevant comments.

Created 11/07/13
# CHANGING PURCHASE ORDERS

**PLEASE AVOID IF POSSIBLE**

---

**May involve:**
- Originator of requisition
- Purchasing
- Business Coordinator
- Receiving Dock
- PeopleSoft Systems Analyst
- Accounts Payable
- Vendor

**Types of Changes:**
- Add/Delete Lines
- Cancellation
- Cost Center Changes
- Merchandise Description
- Increase/Decrease Amount
- Increase/Decrease Quantities
SPECIFICATIONS
A specification is a description of a product or service to be purchased. Specifications are the primary means of communications between a department, Purchasing, and the vendor.

Specifications must include:

- Name or description of item (Example: Desk)
- Material - Metal or wood
- Size/dimensions
- Color
- Brand, model number/product code
- Special features (Example: has lock, drawers on left or right pedestal)
- Installation requirements (FMC does not install or put together furniture)
CHARACTERISTICS of EFFECTIVE SPECIFICATIONS

<table>
<thead>
<tr>
<th>MENTIONED</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>SIMPLE:</td>
<td>Avoid unnecessary detail, but be complete enough to ensure that requirements will satisfy their intended purpose.</td>
</tr>
<tr>
<td>CLEAR:</td>
<td>Use terminology that is understandable. Use correct spelling and appropriate sentence structure.</td>
</tr>
<tr>
<td>ACCURATE:</td>
<td>Use correct units of measure that are in PeopleSoft. All quantities and packing requirements should be clearly identified.</td>
</tr>
<tr>
<td>COMPETITIVE:</td>
<td>Identify a manufacturer's available brand, make, or model that will satisfy the intended purpose.</td>
</tr>
<tr>
<td>FLEXIBLE:</td>
<td>Avoid inflexible specifications.</td>
</tr>
<tr>
<td>PURPOSE:</td>
<td>Intended Use.</td>
</tr>
<tr>
<td>SOLE SOURCE:</td>
<td>Justification is required. Explain why only one manufacturer or vendor can provide. Specify unique features or characteristics. State the reason other sources were not satisfactory.</td>
</tr>
</tbody>
</table>
RETURN of MERCHANDISE
If you have a return...

- Notify Receiving Dock (x2205 / x2206) within 24 hours of receipt of items.
- If merchandise has been received and payment has been made, departments are required to contact vendor for refund or credit.
- Call Purchasing Department for procedures of applying credits to future orders.
- Department may be required to pay restocking charge.
- Department may be required to pay returned shipping charges.
- Purchase orders cannot be changed in PeopleSoft once they are paid and finalized.
SPECIAL PURCHASES
# SPECIAL PURCHASES DEFINED

<table>
<thead>
<tr>
<th>RUSH ORDER</th>
<th>BLANKET ORDER</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unexpected need – Not poor planning within department.</td>
<td>Purchase order issued for a good or service for which an agency has a recurring need on an “as needed” basis. EXAMPLES: Bottled water delivery, Paper, etc.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>EMERGENCY ORDER</th>
<th>ADVANCE PAYMENT ORDER</th>
</tr>
</thead>
<tbody>
<tr>
<td>University will suffer financial or operational damage if goods are not secured immediately. Requestor must furnish justification form.</td>
<td>Vendor will not accept a purchase order. Vendor requires payment before shipment of merchandise. Check must accompany order. Must use Local Funds.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>SOLE SOURCE ORDER (Proprietary)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Only ONE item like it in the whole world. Only ONE item like it in the whole world. Sole Source justification letter required.</td>
</tr>
</tbody>
</table>
SPECIAL PURCHASES CONTINUED

PICK-UP ORDERS
Departments are encouraged to pick up items from vendor by due date on Purchase Order. Print Receiving Report, sign, scan as a PDF file, send to UHCL A/P and UHCL Procurement mailboxes.

BOOK ORDERS
Complete the Bookstore Department Charge Form located on Accounts Payable webpage and submit to Barnes & Noble Campus Bookstore with purchase. There is no dollar limit restriction with the use of this form. State funds still require a purchase order.

COPIER ORDERS
Request a quote from Xerox or Canon sales representative. Include start and end date on requisition for both fiscal year and term of lease. During the months July through September copiers cannot be changed out so plan accordingly. Copier installation and removal forms must be completed before a new machine can be delivered or existing can be removed. Forms are located on Procurement website.
## RESTRICTED FUNDS

<table>
<thead>
<tr>
<th>RH ACCOUNT</th>
<th>RHCE / RHMD / RHV ACCOUNT</th>
<th>Account Description</th>
<th>STATE APPROPRIATED FUNDS</th>
<th>DESIGNATED EHRON FUNDS</th>
<th>STUDENT FEE FUNDS</th>
<th>SPONSORED PROJECT FUNDS</th>
<th>ATHLETICS FUNDS</th>
</tr>
</thead>
<tbody>
<tr>
<td>53205</td>
<td>53200</td>
<td>ENTERTAINMENT AGENTS/PROD SVCS</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>53214</td>
<td>53210</td>
<td>FOOD SERVICES, NON-PROMOTIONAL</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>53215</td>
<td>53215</td>
<td>FOOD SERVICES, PROMOTIONAL</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>53114</td>
<td>53114</td>
<td>RECRUITING STUDENTS</td>
<td>No food or beverage</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>53120</td>
<td>53120</td>
<td>STUDENT EVENTS AND PROMOTIONS</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>53107</td>
<td>53100</td>
<td>FUND RAISING</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>53110</td>
<td>53101</td>
<td>PROMOTIONAL SPECIAL EVENTS</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>53111</td>
<td>53102</td>
<td>ALUMNI ACTIVITIES</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>53112</td>
<td>53103</td>
<td>TICKETS CULTURAL ATHLETIC COMM</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>53118</td>
<td>53104</td>
<td>ALCOHOLIC BEVERAGES</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>53901</td>
<td>53900</td>
<td>BOTTLE WATER/COFFEE SERVICE</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>54472</td>
<td>54470</td>
<td>FOOD/TEACHING</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>54802</td>
<td>54802</td>
<td>CLUB MEMBERSHIP DUES</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>54903</td>
<td>54903</td>
<td>UHS CONFERENCES, DIS OF INFO</td>
<td>No food or beverage</td>
<td>No food or beverage</td>
<td>No food or beverage</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>54911</td>
<td>54911</td>
<td>BUSINESS MEALS - PROSPECTIVE EMPLOYEES</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>54912</td>
<td>54912</td>
<td>STUDENT AWARDS</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>54902</td>
<td>54900</td>
<td>NON-EMPLOYEE AWARDS</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>54904</td>
<td>54901</td>
<td>EMPLOYEE AWARDS</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>54905</td>
<td>54902</td>
<td>BUSINESS MEALS</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>55100</td>
<td>55100</td>
<td>PARK FOR IN-HOUSE BUS MEETINGS</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>55101</td>
<td>55101</td>
<td>UNIV HOSTED SPECIAL EVENTS</td>
<td>No food or beverage</td>
<td>No food or beverage</td>
<td>No food or beverage</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>55102</td>
<td>55102</td>
<td>COMMENCEMENTS/CONVOCATIONS</td>
<td>No food or beverage</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
</tr>
</tbody>
</table>
TRADE-INS

If the department requests new equipment and offers a trade-in of old equipment, the following information is required to process the order regardless of the source of funds:

1. Age of the item (year purchased)
2. Make and model number
3. Serial number
4. Condition
5. UHCL Tag number
6. Realistic estimate of current value
7. Location of the item
HOW TO PRINT RECEIVING REPORTS FOR ITEMS **NOT** DELIVERED BY RECEIVING DOCK

Steps to Print Receiving Report in PeopleSoft:
1. PeopleSoft Main Menu
2. Custom Reports
3. PO
4. Print PO Receiving Copy
5. Search by Purchase Order

PLEASE SEE REQUISITION WORKFLOW TRAINING DOCUMENTS LOCATED ON THE BUDGET OFFICE PAGE OF THE UHCL WEBSITE.
PURCHASING GUIDELINES-LEDGER 5

University policy involving expenditure of Research Administration Funds (RAF) - Ledger 5 is:

- To abide by the general procurement standards of the Office of Sponsored Programs (OSP) Circular A-110. Circular A-81 states that any purchases with federal funds must be bid at $3,000.00.

- To provide free and open competition whenever and wherever possible.

- To provide for sole source procurement.

- Approval of Office of Sponsored Programs is required.

- Follow University local fund guidelines.
Shopping for Personal use Prohibited!
ELECTRONIC STATE BUSINESS DAILY
PURCHASES EXCEEDING $25,000 WILL BE ADVERTISED A MINIMUM OF:

- **14 days** if posting entire bid/proposal package
- **21 days** if not posting entire bid/proposal package
- Purchases from State (Term) Contracts are not posted to ESBD.
CMBL & HUB PROGRAM
WHAT IS THE **CENTRALIZED MASTER BIDDERS LIST**?

The CMBL is a master database used by State of Texas Purchasing entities to develop a mailing list for vendors to receive bids based on the products or services they can provide to the State of Texas. It is maintained by Comptrollers of Public Accounts (CPA). This list is used when searching for a vendor that sells a particular item. A search can be done on the CMBL website to retrieve vendor information by a combination of the fields listed below:

- **VENDOR NAME**
- **FEDERAL EMPLOYER IDENTIFICATION NUMBER (FEIN)**
- **AVAILABILITY OF HUBS**
- **COMMODITY CODE**
The HUB program is to promote full and equal business opportunities for minority and woman owned businesses. Each state agency is required by State Law to make a good faith effort to meet or exceed the following goals:

<table>
<thead>
<tr>
<th>Service</th>
<th>State Goals</th>
<th>UHCL Goals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Heavy construction (other than building contracts)</td>
<td>11.2%</td>
<td>0%</td>
</tr>
<tr>
<td>Commodities</td>
<td>21.9%</td>
<td>40%</td>
</tr>
<tr>
<td>Professional Services</td>
<td>23.6%</td>
<td>8%</td>
</tr>
<tr>
<td>Building Construction</td>
<td>21.1%</td>
<td>20%</td>
</tr>
<tr>
<td>Special Trade Construction</td>
<td>32.7%</td>
<td>15%</td>
</tr>
<tr>
<td>Other Services</td>
<td>24.6%</td>
<td>8%</td>
</tr>
</tbody>
</table>
UNIVERSITY COMMITMENT

> Fair and equal treatment of all vendors
> Solicit competitive bids from HUBs
> Award bids to those businesses that meet the best value requirement
> Departments can help achieve these goals by obtaining quotes from HUBs

The CMBL can help you search for certified HUBs.

https://mycpa.cpa.state.tx.us/tpasscmblsearch/index.jsp
WHO QUALIFIES AS A HUB VENDOR?

A for-profit business which is 51% or more owned by a Black American, Hispanic American, Asian Pacific American, Native American, American woman-owned and/or a Service Disabled Veteran. To receive HUB status they must reside in Texas and actively participate in the control operations and management of the entity’s affairs.

Legal source-Texas Government Code, Title 10, Subtitle D, Section 2161
# HUB Recognition

<table>
<thead>
<tr>
<th>Year</th>
<th>State Ranking</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY2016</td>
<td>UHCL ranked #11 in State</td>
<td>34.42%</td>
</tr>
<tr>
<td>FY2015</td>
<td>UHCL ranked #12 in State</td>
<td>30.53%</td>
</tr>
<tr>
<td>FY2014</td>
<td>UHCL ranked #2 in State</td>
<td>39.92%</td>
</tr>
<tr>
<td>FY2013</td>
<td>UHCL ranked #3 in State</td>
<td>42%</td>
</tr>
<tr>
<td>FY2012</td>
<td>UHCL ranked #20 in State</td>
<td>26.83%</td>
</tr>
<tr>
<td>FY2011</td>
<td>UHCL did not rank</td>
<td>26%</td>
</tr>
<tr>
<td>FY2010</td>
<td>UHCL ranked #7 in State</td>
<td>40.14%</td>
</tr>
</tbody>
</table>

This ranking is for the top 25 agencies spending over $5 million with HUBs. Percentage is based on 182 reporting agencies.
HUB OUTREACH

The University’s focus is:

- University annual HUB Fair
- Local minority councils-Houston Minority Supplier Development Council (HMSDC) and Women’s Business Enterprise Alliance (WBEA).
- Expos sponsored by HMSDC and the City of Houston.
- State Economic Forums
- HUB visitation
- Mentor protégé
STATE FUNDS ONLY
1st CHOICE RECYCLED PRODUCTS

All state agencies are required to purchase 1st Choice Products when using state funds.

PER TEXAS GOVERNMENT CODE, TITLE 10, SUBTITLE D, SECTION 2155.448, EACH FISCAL YEAR THE CPA, IN COORDINATION WITH THE RECYCLING MARKET DEVELOPMENT PROGRAM, BY RULE, MAY IDENTIFY RECYCLED, REMANUFACTURED, OR ENVIRONMENTALLY SENSITIVE COMMODITIES OR SERVICES AND DESIGNATE PURCHASING GOALS FOR THE PROCUREMENT OF THOSE COMMODITIES AND SERVICES BY STATE AGENCIES FOR THAT FISCAL YEAR.
1ST CHOICE PRODUCTS FOR FISCAL YEAR 2018

- Re-refined Oils And Lubricants
- Recycled Content Toilet Paper, Toilet Seat Covers And Paper Towels
- Recycled Printing Paper, Copier Paper, Computer Paper And Business Envelopes
- Recycled Paper Must Be Requested For Off-campus Printing
- Plastic Trash Bags
- Recycled Containers
- Plastic-covered Binders
- Energy Star Labeled Copiers
JUSTIFICATION WAIVER

If the virgin equivalent of the item must be purchased, a letter of justification must be signed by the President of the University and sent to Comptroller of Public Accounts (CPA).

If your department needs this letter of justification, please contact the Purchasing Department. The requesting Department will be responsible for obtaining the signature from the President.
STATE TERM CONTRACTS & TIBH

- State term contracts should be utilized when possible.
- TIBH is a set-aside contract and must always be given first consideration.
- TIBH information is available online at http://www.tibh.org/.
ANY ORDER **ON STATE FUNDS**
FOR ITEMS **OVER $15.00**
MUST
BE PURCHASED FROM TIBH.

**Texas Procurement and Support Services (TPASS)** awards and manages hundreds of statewide orders on behalf of more than 200 state agencies and 1,700 local government agencies.
TIBH VERIFY TAB

The tab is visible on requisitions that uses the same commodity codes as items available through TIBH.

**TIBH VERIFY only applies to state fund purchases.**
TIBH VERIFY TAB

A requisitions that uses state funds and has the same category codes as items available through TIBH will receive a message.
TIBH VERIFY TAB

When using state funds and a commodity code available on TIBH:

1. Check [https://wwwtibh.org](https://wwwtibh.org) to determine if the item is available.
   - If “NO”, continue with requisition as normal.
   - If “Yes”, select the reason(s) why you’re not buying the good or services from TIBH.

![TIBH Verify Tab](image_url)
ON-CAMPUS VENDORS
PRIORITY SPENDING

IF AN ITEM OR SERVICE IS AVAILABLE FROM:

- Copy Services
- Facilities Management & Construction (FMC) Approval before ordering large equipment or attaching to walls.
- University Computing & Telecommunications (UCT)
- Food Services

THE ITEM SHOULD BE OBTAINED FROM THE ON-CAMPUS VENDOR.
PRINTING/COPYING PROCEDURES

1) See if the Copy Services can do job.
2) If they are unable to do job, obtain Off Campus Printing Approval form (issued by Copy Services) and attach to requisition.
3) Get quote from a vendor.
4) Make sure that you have good specifications.
5) When using state funds recycled paper is REQUIRED.
6) Get signature approvals.
7) Under $5,000 will call and place print orders.
8) Over $5,000 must be bid (Unless using UHCL Copy Services).
9) Copying, contact copy service for quote.
AUXILIARY SERVICES
AUXILIARY SERVICES

- **Vending Service**
  - **Drinks** – Houston Coca-Cola Bottling Company
  - **Snacks** – Canteen Vending
  **NOTE:** For refunds, go to the Student Business Services Office on the 1st Floor of the Student Services Building. For service issues or concerns, call the Senior Staff Assistant at (281) 283-2150 or email/text [vending@uhcl.edu](mailto:vending@uhcl.edu). You will be asked to provide the equipment ID number located on the front panel of the machine.

- **Food Service** – Chartwells

- **Bookstore** – Barnes & Noble
ADVERTISEMENTS

YOUR Message here!
ADVERTISEMENTS

ALL ADVERTISEMENTS (PRINTED & ONLINE) REQUIRE BRAND APPROVAL BY BRAND GUIDE. SUBMIT REVIEW REQUEST TO BrandGuide@uhcl.edu.

IN ADDITION, HUMAN RESOURCES MUST APPROVE THE AD IF IT PERTAINS TO EMPLOYMENT.

EMAIL DOCUMENTATION AND AD MUST BE PROVIDED ALONG WITH REQUISITION.
TEMPORARY EMPLOYEES
TEMPORARY EMPLOYEES

The University of Houston System currently has a contract with Adroit Partners.

To utilize this contract, please complete the following steps:

1.) Submit the UHCL Temporary Labor Request Form to Human Resources for approval. This form is located on the UHCL Procurement Forms web page. Be sure to include a description of job duties, title, length of time and business hours the temporary person is expected to work.

2.) If Human Resources approves the temporary position, they will assign a bill rate and sign the form.

3.) Prepare and submit a requisition to procurement with the signed form included as back-up.
QUESTIONS?
Thank you for attending the Procurement Workshop.