The UMDNJ Purchasing Services Department strives to enable highly efficient and clear research purchasing processes for researchers while ensuring compliance with State of New Jersey regulations and University policies.

Below are several research purchasing considerations that should be recognized in order to avoid unexpected purchasing delays and difficulties.

In addition to reviewing the information below, please take time to review the [UMDNJ Purchasing Process Policy](mailto:http://www.umdnj.edu/oppmweb/university_policies/purchasing_services/PDF/00-01-60-05_00.pdf) for details about approvals, bid requirements, thresholds and bid waivers.

**Approved Vendors and Soliciting Bids**

All university researchers can purchase equipment and supplies from approved contracted vendors. Presently, there is a UMDNJ wide contract (P08-080) for research equipment, supplies and accessories that includes over 85 vendors. In addition, researchers can order items from State of New Jersey approved vendors covered by the State contract (T0115) for research equipment and supplies. If there are questions concerning the use of either contract, the researcher may contact [Giovanna DiGuglielmo](mailto:diguglgi@umdnj.edu) at 5-9774, [Kimberly Satnowski](mailto:lundki@umdnj.edu) at 5- 9486 , or [Edwing Canaca](mailto:canacaes@umdnj.edu) at 5- 9040. Importantly, there is no spend limit for vendors under a UMDNJ contract, a State contract or a group purchasing contract (GPO), if open to UMDNJ. Concerning GPO contracts, please check with either buyer identified above.

[**UMDNJ Approved Research Vendor List P08-080**](mailto:http://www.umdnj.edu/purchweb/words_download/P08-080_VendorList_2012-5.pdf)

[**State of New Jersey Approved Vendor Lists**](mailto:http://www.umdnj.edu/purchweb/words_download/Vendor%20List%20for%20T-0115.pdf)

If a researcher’s or a school’s business with a non-contracted vendor during the course of a fiscal year exceeds or is projected to exceed $28,000, the researcher/school may contact [Stanley S. Makarevic](mailto:makaress@umdnj.edu) at about the possibility of conducting a supplemental bid to UMDNJ contract, P08-080. Note, it is always easier to transact business without interruption with a contracted vendor.

**Vendor Spending Limits – Non Contract (Aggregate Purchases by School or Unit below $28,000)**

If a proposed vendor is either not under a contract (UMDNJ, State or GPO) or the product/service to be purchased is not under contract, the following rules and limitations apply. In any fiscal year, the maximum spend by a school or unit with any non-contracted vendor cannot exceed $28,000 in the aggregate. If the spend exceeds $28,000, the school or unit should contact the Purchasing Services Department to determine if an advertised bid is required under UMDNJ purchasing rules or the Bid Waiver Coordinator (see below) to determine if a waiver of bid is feasible under the circumstances.

Although you may only be ordering a small amount of inexpensive supplies (e.g. $200 in reagents from Company X), it is possible that the total dollar amount of approved purchases from this vendor has already been reached school-wide. If this is the case, no further purchases from this vendor can occur until a new contract is established. If an aggregate purchasing limit has been reached and you cannot buy from your intended vendor, the following options may be available 1) buy from a different approved vendor if possible, 2) contact Purchasing Services Department about an advertised bid, or 3) submit a bid waiver justification request.

As you can see, to avoid being shut out of purchasing from your approved vendor of choice, it’s best to initiate the purchasing process as soon as you know you will need the item(s).

**Purchasing Rules for procurements under $ 28,000**

The following rules apply when the school’s aggregate spend in a fiscal year will not exceed $28,000.

Purchases under $2,500 – no quote required. Submit requisition in Marketplace.

Purchases between $2,500 and less than $10,000- Verbal quotes may be accepted, but written quotes are preferred. School must obtain 3 vendor quotes. If 3 quotes cannot be obtained, then the school or unit must submit a justification explain the reasons 3 quotes could not be obtained with the requisition filed in Marketplace.

If the vendor is sole source or the school claims standardization for the product/equipment./item to be purchased, then the school or unit must submit supporting justification for the claim with requisition in Marketplace.

Purchases between $10,001 and $28,000- School must provide 3 written quotes. If 3 written quotes are not available, then submit justification (as noted above) or provide sole source/standardization justification with requisition in Marketplace.

If the researcher or school cannot obtain the required quotes, the Purchasing Services Department can provide assistance to obtain the required competition.

**Bid Waivers (Purchases over $28,000 in a fiscal year)**

When products from non-contracted vendors are needed and there is competition, then an advertised bid must be conducted by the Purchasing Services Department. If there is no competition for the product or service, then a bid waiver request must be submitted. There are several legitimate reasons for a bid waiver, including the item being available only from one vendor (sole source) or for scientific validity in the case of continuing your research or validating prior research (yours or by others) which has been done with a particular product from a particular vendor (standardization). Please contact the Bid Waiver Coordinator, [Stanley S. Makarevic](mailto:makaress@umdnj.edu) at (5-4676) or at for more information about and requirements of bid waivers. [The Waiver of Bid policy is available here for your review.](http://www.umdnj.edu/oppmweb/university_policies/purchasing_services/PDF/00-01-60-10_00.pdf)

[**NIH Modular Grants**](http://www.umdnj.edu/purchweb/words_download/NIH_Modular_Grants_under_the_Blanket_WaiverforGrants_dl053012.docx)

Equipment and supplies that are cited in awarded NIH protocols and approved budgets need not be bought from approved vendors, bid out, or waiver-justified. The same goes for awards made by other federal agencies, such as NSF and the CDC. Such items specifically stipulated in federal grants are free from many, but not all, State and UMDNJ purchasing restrictions. However, in the case of NIH Modular Grants in which itemized budgets are not required in applications, there is no blanket approval for these items which will be used in your grants. At this time, purchases for items to be used in NIH Modular Grant projects need to follow the same requirements as all other non-NIH projects. The Office of the VP for Research and the Purchasing Services Office are working on establishing purchasing exemptions for NIH Modular Grants consistent with other federal award exemptions.

**Purchase Order Approval Times**

For all of the above reasons it is very important to initiate purchasing procedures as soon as possible to ensure the approval and acquisition processes meet your research project timetables. It’s also important to remember that more expensive equipment requires a higher level of administrative approval. More time may be required to obtain approvals; for example, purchase orders that exceed $500,000 require Board of Trustees approval, and that body usually only meets once per month, but not in August, throughout the academic year. The best approach is to start the purchasing process as soon as you are sure you will need the item(s).

Purchase order approval times may also be delayed by the need for Purchasing Services to obtain required State compliance forms from the vendor. Purchasing Services exercises its best effort to maintain compliance forms on vendors that UMDNJ conducts business with on a regular basis to minimize business interruptions. However, especially in the research area, UMDNJ finds the need to transact business with new vendors who do not have State required compliance forms on file. A delay by the vendor in submitting required State compliance will delay the issuance of the purchase order. There may be times when Purchasing Services will reach out to the researcher/school for assistance in convincing vendors to submit the required State compliance.

**Product Evaluation/Equipment Trial Policy**

UMDNJ has adopted and implemented a formal equipment trial/product evaluation policy. This policy provides the guidelines on trialing equipment and/or product at UMDNJ. In addition, before equipment and/or product are trialed, the policy requires that vendor enter into a formal equipment trial agreement with UMDNJ. No equipment or product is to be trialed at UMDNJ without an agreement in place. [The policy can be accessed here](http://www.umdnj.edu/oppmweb/university_policies/purchasing_services/PDF/00-01-60-30_00.pdf). If a researcher has any questions concerning this policy or conducting equipment or product trials at UMDNJ, the researcher should contact one of the following in the Office of Supply Chain Management:

[Stanley S. Makarevic](mailto:makaress@umdnj.edu) (Acting Purchasing Manager for Medical and Research Purchasing Team) (5-4676)

[Daniel Young](mailto:youngdj@umdnj.edu) (Purchasing Manager for Professional Services Buying Team) (5-9007)

[Doug Dennis](mailto:dennisdo@umdnj.edu) (Purchasing Manager) (5-9049)

**Purchasing Contacts for Researchers**

If a researcher has any questions concerning these procedures or any question at all, the researcher can contact the Purchasing Services Department.

1. **Equipment, Service and Maintenance of Equipment, Supplies (reagents, etc.) and Accessories**

[Giovanna DiGuglielmo](mailto:diguglgi@umdnj.edu) (5-9774)

[Edwing Canaca](mailto:canacaes@umdnj.edu) (Procurement Coordinator for Medical and Research Purchasing Team) (5-9040)

[Marcela Crisetti](mailto:%20crisetma@umdnj.edu) (5-9533)

[Stanley S. Makarevic](mailto:makaress@umdnj.edu) (Acting Purchasing Manager for Medical and Research Purchasing Team) (5-4676)

**Contract Analysts**

[Kimberly Satnowski](mailto:lundki@umdnj.edu) 5-9486

[Sarika Tandon](mailto:tandonsa@umdnj.edu) 5-9033

1. **Professional Services (including grant funded professional services)**

[Daniel Young](mailto:youngdj@umdnj.edu) (Purchasing Manager for Professional Services Buying Team) (5-9007)

[Yvonne Miranda](mailto:mirandyv@umdnj.edu) (5-9069)

[Jennifer Havens](mailto:%20havensjl@umdnj.edu) (5-9886)

[Jessica Then](mailto:thenje@umdnj.edu) (5-9026)

**Contract Analysts**

[David Fenkel](mailto:fenkelda@umdnj.edu) (5-9531)

[Diane Yourcheck](mailto:yourchdi@umdnj.edu) (5-9510)

**Summary**

We all want efficient purchasing processes to ensure seamless research activities, free from unwanted delays and other administrative obstacles. Yet there are regulatory and policy issues as described above which are unavoidable. Please be proactive with all of your grant purchasing objectives and initiate all the needed steps at your earliest opportunity to avoid unnecessary trouble later.