

**UConn**

FISCAL INSTITUTE FOR TRAINING (FIT)

# UNIVERSITY BUSINESS SERVICES (UBS)

# TRAINING AGENDA

- Introduction to University Business Services (UBS)
- Procurement Fundamentals & Principles
- IT, Research, Business Support Services, Professional and Specialized Services Procurement
- University Travel and Payment Card Services
- Capital Projects and Facilities Procurement (CPFP)
- Procurement Center of Excellence (CoE)
- University Supplier Diversity Program (USDP)
- Procurement Contracting and Compliance (PC&C)
- Procurement Compliance and Insurance

# WHO WE ARE

**Joseph Thompson**  
AVP & Chief Procurement Officer

Melanie Savino  
Exec Program Manager

**Lynn Lesniak**  
Director  
Capital Projects & Facilities

*Vacant/Search in Process*  
Director  
Procurement & Supplier Diversity

**VACANT**  
Director  
Contracting & Compliance

**David Denuzio**  
Associate Director  
Center of Excellence

Adrienne Gilnack  
Admin Svc. Spec.  
Temp Support

Document Production  
Center

Lisa Miezkwicz  
Category Manager  
Facilities & MRO

Shamona Kamm (B2)  
Kathleen Susca (B1)

Cesar Alonzo  
Category Manager  
Construction Services

Griffin Fehrs (B2)  
Christopher Peters (B2)

Buyer I  
*Vacant/Search 497412*

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II (Travel)

Katherine Papalionakis  
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(PCard)

Kathy Cyr  
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Veronica Cook  
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Victoria Novak  
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Support II

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Sr. Contract Spec.  
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Contract Spec.  
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(Project Mgmt., Analysis,  
Technology, Vendor  
Creation)

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Procurement Analyst

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Procurement Analyst

Jeremiah Macht  
Comp Sup Tech II

Sean Martin  
Admin Program Support  
II

# WHAT IS OUR PURPOSE?

To assist our customers in the acquisition of the goods and services required by the university that are **fit for the purpose intended** at the best possible **value** while ensuring **compliance with all Federal, State and University Requirements**.

# SOME OF OUR GUIDING PRINCIPLES

- Do What Is Best For The University Community As A Whole
- Be Valued Strategic Partners To Our Stakeholders & Customers
- Provide High Quality Customer Service
- Add Value Through Our Expertise
- Provide Solutions...Solving Problems & Unlocking Opportunities
- Focus On Continuous Improvement
- Provide A Growth Oriented & Creative Environment

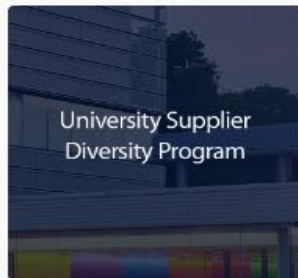
## University Business Services

Search this site... 

- [Home](#)
- [About Us](#) ▾
- [Supplier Diversity](#)
- [Card Services Center](#)
- [Resources](#) ▾
- [FAQs](#)



**University Business Services**  
University Business Services is a customer-focused organization that is committed to providing quality, user-friendly, cost-effective and expert business support to all customers in support of the University's core mission to promote the educational, research, and clinical missions of One UConn.



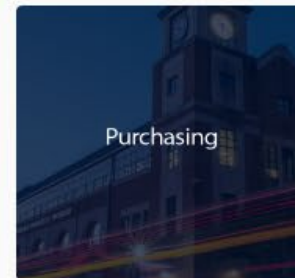
University Supplier Diversity Program



Procurement Contracting and Compliance



Capital Projects and Facilities Procurement



Purchasing

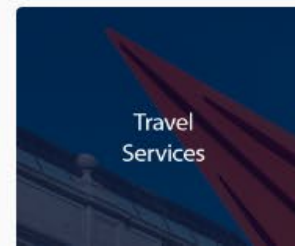


UConn Health Procurement



UNIVERSITY BUSINESS SERVICES  
**NEWS FLASH**

Hotel & Events Services Form



Travel Services



### HUSKYBUY

[LOGIN](#)

[JOB-AIDS](#)

[Emergency Purchase Procedure](#)

[Contract Status](#)


[Tier 2 Supplier Survey](#)

### Contact UBS

 860.486.2619

 860.486.5051

 [Directions](#)

 8:00 a.m. – 5:00 p.m.

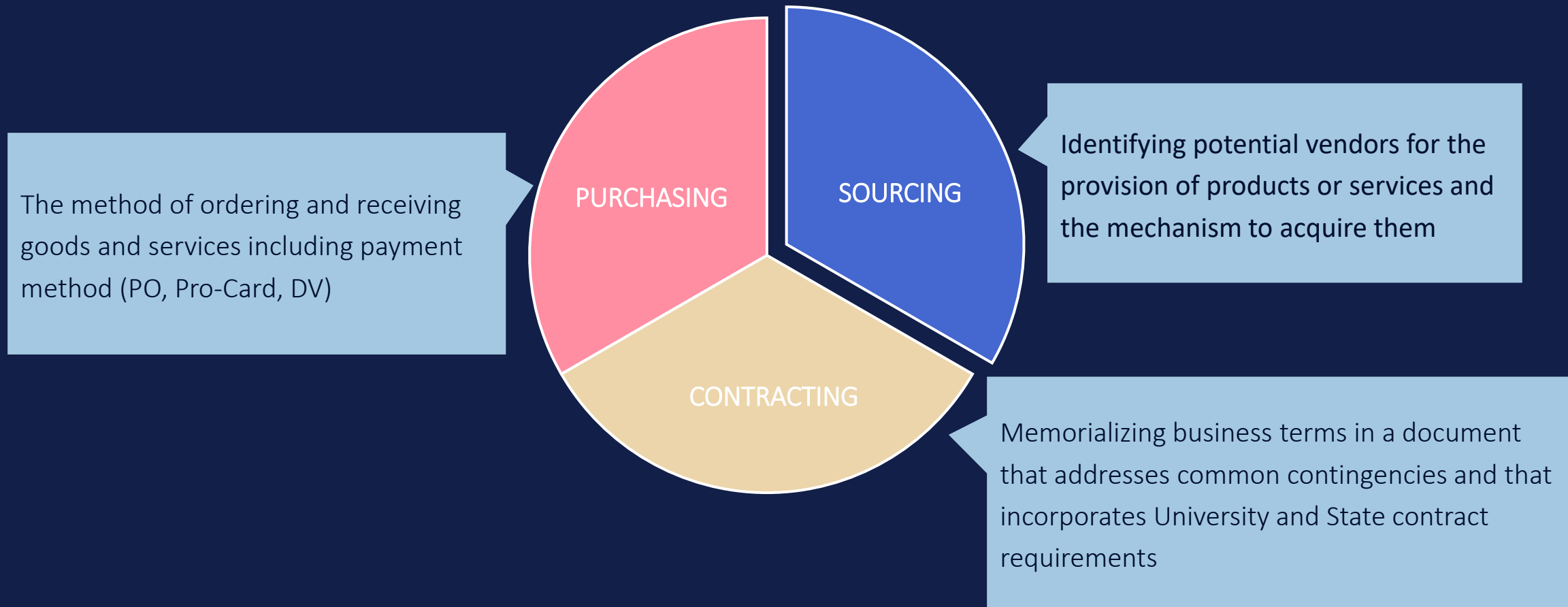
# PROCUREMENT FUNDAMENTALS & PRINCIPLES



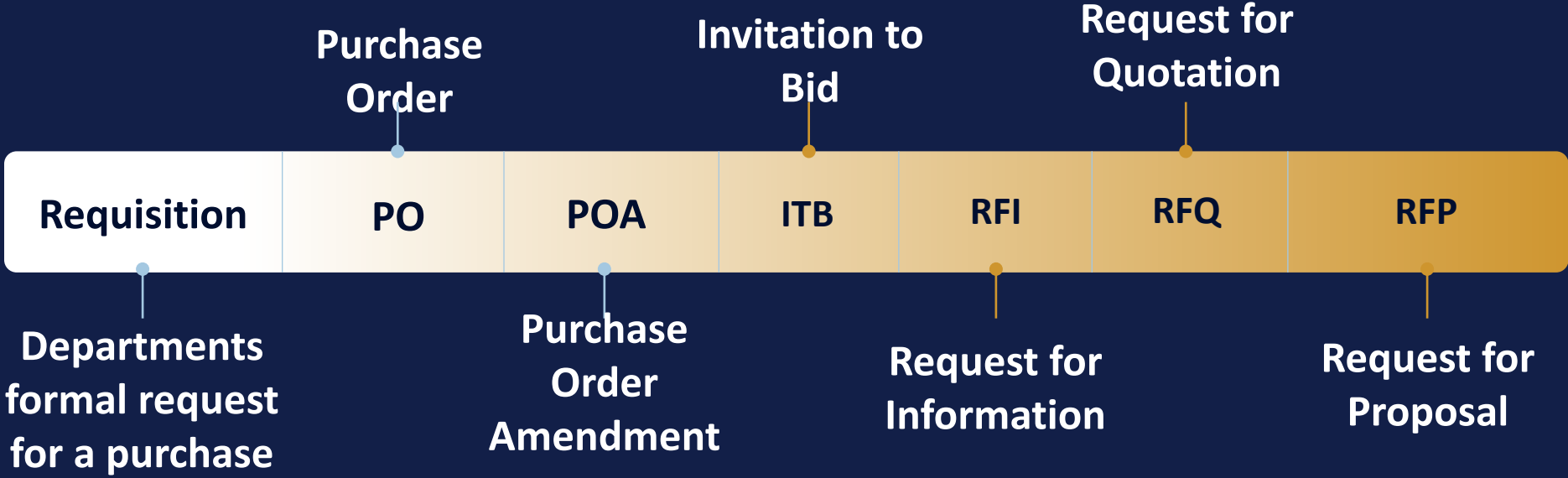
# LEARNING OBJECTIVES

- Gain knowledge on the basics of procurement
- Learn the various sourcing methodologies and thresholds utilized by Procurement
- Choose the appropriate purchasing methods for various procurements
- Recognize common reasons for delays and best practices to minimize them

# WHAT IS PROCUREMENT?



# GLOSSARY OF PROCUREMENT "TERMS"



# PUBLIC INSTITUTION THRESHOLD GUIDELINES

Established by State & Federal Laws and Regulations

Guidelines for our Procedures – University Policies

Uniform Guidance for Federal Funds

# UNIFORM GUIDANCE

1. Applies to purchases made with sponsored programs/federal funds.
2. In practice, does not apply to Construction purchases
3. A set of regulations that consolidate federal guidelines impacting research administration.
  - a. Located at 2 CFR 200...effective 7/1/18.
4. Reformed federal grant making to focus resources on improving performance and outcomes.
5. Micro-purchase Threshold (MPT) –increased to \$25,000.00 effective 10/1/2023. The Pro-Card threshold remains at its current \$4,999.99 threshold for individual transactions, meaning that there is no change in procurement practices for any Pro-Card purchases under UG.
6. See <https://purchasing.ubs.uconn.edu/uniform-guidance/>

# SOURCING THRESHOLDS (STATE V UNIFORM GUIDANCE)

State: Less than \$25,000.00	\$25,000.00 - \$99,999.99	\$100,000.00 and over (UBS support required)	Less than \$25,000.00	\$25,000.00 - \$249,999.99	\$250,000.00 and over (Procurement Services Support Required)
<ul style="list-style-type: none"> <li>Threshold applies to the total value of the procurement transaction</li> <li>1 quote required, multiple encouraged</li> </ul>	<ul style="list-style-type: none"> <li>Requires three quotes; stakeholder justifies the best value selection in writing if the lowest cost is not selected</li> </ul>	<ul style="list-style-type: none"> <li>Requires a publicly advertised solicitation process; Procurement support/management required.</li> </ul>	<ul style="list-style-type: none"> <li>Threshold applies to the total value of the procurement transaction</li> <li>1 quote required, multiple encouraged</li> </ul>	<ul style="list-style-type: none"> <li>Requires three quotes; stakeholder justifies the best value selection in writing if the lowest cost is not selected</li> </ul>	<ul style="list-style-type: none"> <li>Requires a publicly advertised solicitation process; Procurement support/management required.</li> </ul>

# WHAT IS SOLE SOURCE?

- Documented single source for goods or services
  - Only one supplier (source) can deliver the required good or service.
  - \*Multiple resellers/distributors voids Single Source classification
- A sole source purchase is a method of acquisition. It is not to be used to avoid competition.
- Sole source justification requests must be approved by Procurement prior to an order being placed and/or services being provided.
  - Price is not justification: it indicates the existence of a competitive marketplace.
- Continuity of services

Form Link:

[https://media.procurement.uconn.edu/purchasing/images\\_resources/forms/SoleSource.pdf](https://media.procurement.uconn.edu/purchasing/images_resources/forms/SoleSource.pdf)

# WHAT IS (AND WHAT IS NOT) SOLE SOURCE?

## Valid Examples

- Patented/Copyrighted materials
- Intellectual Property
- OEM (maintenance or repairs)
- Proprietary Item or Service
- Mandates of specific provider
- Territory Rights/Restrictions

## Invalid Examples

- Price
- “Familiar with UConn”
- Top Expert
- Existing Professional Relationship
- Team Sponsorship

# PURCHASING METHODS

Type	What is it?	When Should I use it?
<b>HuskyBuy</b> <b>Purchase Orders</b>	Catalog (HuskyBuy) Non-catalog (HuskyBuy) transactions	Purchase of Goods & Services Preferred method for ordering
<b>Disbursement Vouchers</b> <b>Note: Processed by</b> <b>Accounts Payable</b>	A payment mechanism for goods/services that have already been delivered to the University up to \$2,500 per supplier per fiscal year	When the use of HuskyBuy or Pro-Card is not possible, e.g., payments to other universities, utilities, postal charges, real estate payments, professional services, awards & Fellowships (non-student) journals, periodicals, etc.
<b>Pro-Card</b>	Method of purchasing low dollar value purchases from suppliers that accept credit cards	Purchase of low dollar transactions or if the items cannot be purchased through HuskyBuy
<b>Travel Card</b>	Method of paying for travel-related business expenses incurred <u>while</u> traveling on legitimate University business	Purchase of travel-related expenses (while traveling), e.g., transportation, meals (if not claiming Per Diem), baggage fees, incidentals, etc.

# HUSKYBUY

## Catalog

- All on Contract
- No Spend Limitations

## Non-Catalog

- Contract
- Non-Contract
- Disbursement Vouchers

Simple Advanced

Go to: Favorites | Forms Browse: Suppliers | Categories | Contract

Search for products, suppliers, forms, part number, etc.

## UPDATE: AlphaGraphics

There are still issues with the AlphaGraphics Punchout site that is preventing access for HuskyBuy users. We are aware of the problem, and it has been escalated to our e-procurement provider Jaggaer to work directly with AlphaGraphics leadership and technical staff to fix the issue.

In the interim, if you wish to place an order, you may do so using the non-catalog requisition form and submitting a quote. For quotes, you may reach out to AlphaGraphics team email at: [us667@alphagraphics.com](mailto:us667@alphagraphics.com)

We will advise of the resolution as soon as possible. Thanks for your patience and apologies for the inconvenience.

### Training:

- HuskyBuy Resources
- New VWR Address Updated 5/20/22
- What's New in the New Search Experience
- New Search Tutorial Highlights

Please contact HuskyBuy Support at [huskybuysupport@uconn.edu](mailto:huskybuysupport@uconn.edu) with any questions.

### Non-Catalog Requisition Forms

Goods & Services

Blanket Order

External Catering

Equipment Request

Software & IT Service

Biological Agent  
Clean Air Device  
Radioactive  
EHS Purchase Approval

### Payment Requests

Disbursement Voucher

Guest Travel Reimbursement

### Internal Request Forms

PCard Gift Card Preapproval

PCard Software Preapproval

Shipping Address

Catalog Supplier Request

### Research Suppliers

Airgas  
Free Shipping

BIO-RAD

Fisher Scientific

ThermoFisher  
SCIENTIFIC  
formerly Life

QIAGEN

MILLIPORE  
SIGMA

# HUSKYBUY HOME PAGE

# SHOPPING WITH CATALOGS

**HUSKYBUY UCONN** All Search (Alt+Q) 0.00 USD

Simple Advanced Go to: Favorites | Forms Browse: Suppliers | Categories | Contracts

Search for products, suppliers, forms, part number, etc.

## AlphaGraphics Punch-out Unavailable

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### Non-Catalog Requisition Forms

### Payment Requests

### Internal Request Forms

### Research Suppliers

 Free Shipping					
			 \$100 Minimum or \$20 Fee		

### Technology Suppliers

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### MRO Suppliers

# SHOPPING WITH FORMS – NON-CATALOG

**HUSKYBUY UCONN** All Search (Alt+Q) 0.00 USD 37 498

Simple Advanced Go to: [Favorites](#) | [Forms](#) Browse: [Suppliers](#) | [Categories](#) | [Contracts](#)

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### Non-Catalog Requisition Forms

- Goods & Services
- Blanket Order
- External Catering
- Equipment Request
- Software & IT Service
- Biological Agent Clean Air Device Radioactive EHS Purchase Approval

### Payment Requests

### Internal Request Forms

### Research Suppliers

### Technology Suppliers

### MRO Suppliers

### Office Supplies

### Office Furniture Suppliers

### Promotional Products

### Printing Suppliers

# THINGS TO CONSIDER



Unsolicited telephone sales/emails should be referred to Purchasing



Be mindful of potential conflicts of interest (CT State Code of Ethics)



Contact the appropriate Purchasing Team early in the process



Discuss all aspects of the need



All vendors should be given the same information



Conduct all business dealings in an impartial and ethical manner



Do not commit the University (e.g., by signing a contract or quote) without proper review and/or signature authority

# COMMON REASONS FOR DELAYS

- Supplier registration errors or conflicts
- Internal processing delays in department
- Obtaining required approvals
- Unauthorized purchases/signatures
- Failure to include specifications and/or supporting documentation with requisition

# IT, Research, Business Support Services, Professional and Specialized Services Procurement



# LEARNING OBJECTIVES

- Overview of IT, Research, Business Support Services, Professional and Specialized Services Procurement
- Understand the role and responsibilities of the Procurement Services Team supporting these areas

# WHO WE ARE

**Joseph Thompson**  
AVP & Chief Procurement Officer

Melanie Savino  
Exec Program Manager

**Lynn Lesniak**  
Director  
Capital Projects & Facilities

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Buyer I  
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Alyssa Wojcik  
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II (Travel)

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Document Production  
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# WHAT WE DO

## Goods and Services We Procure

- **Research** 
  - Medical Services, Lab and Classroom Equipment, Supplies and Services
- **Information Technology** 
  - Software Licenses, Maintenance and Support, Software as a Service, Desktop and Tablet Computers
- **Business Support Services** 
  - Subscriptions/Dues, Fees/Sponsorship, A/V Equipment and Supplies, Furniture, Advertising
- **Professional and Specialized Services** 
  - Banking Services, Athletic Equipment and Supplies, Education Abroad, Transportation, Hotels/Lodging, Food, Catering, Consulting Services

**HUSKYBUY**

# SPEND UNDER MANAGEMENT BY CATEGORY FY 23

Category	Overall Spend
Research	\$43,658,787
Information Technology	\$46,759,591
Business Support Services	\$73,041,386
Professional and Specialized Services	\$92,204,511
<b>TOTAL</b>	<b>\$255,664,275</b>

# Travel and Payment Card Services



# LEARNING OBJECTIVES

- To educate the University community about Concur, University Travel and Card Services (Pcard and Tcard) policies and procedures to ensure that all cardholders and travelers are compliant.

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# PROCUREMENT CARD (PRO-CARD)

The University Pro-Card issued by, JP Morgan Chase, is a MasterCard which acts as a procurement tool offering an alternative to the existing University procurement processes. It provides an extremely efficient and effective method of purchasing and paying for goods and services with a value less than \$4,999.99.

<https://purchasing.ubs.uconn.edu/purchasing-card/>

## Limits

- Single purchase limit not to exceed \$4,999.99
- Spending limit per month \$10,000.00

## Contacts

- Phone 860-486-2289 (option 2)
- Pcard@uconn.edu



# WHAT IS CONCUR?

- SAP Concur, is a cloud-based Travel & Expense management software application available to UConn. Concur allows UConn employees and students to capture travel and other UConn business expenses on a Concur report.
- The following modules are included:
  - **Request Module:** To seek pre-approval for travel.
  - **Travel (Booking) Module:** Concur's online booking tool.
  - **Expense Module:** To record business expenses – includes out-of-pocket expenses as well as University Card products.



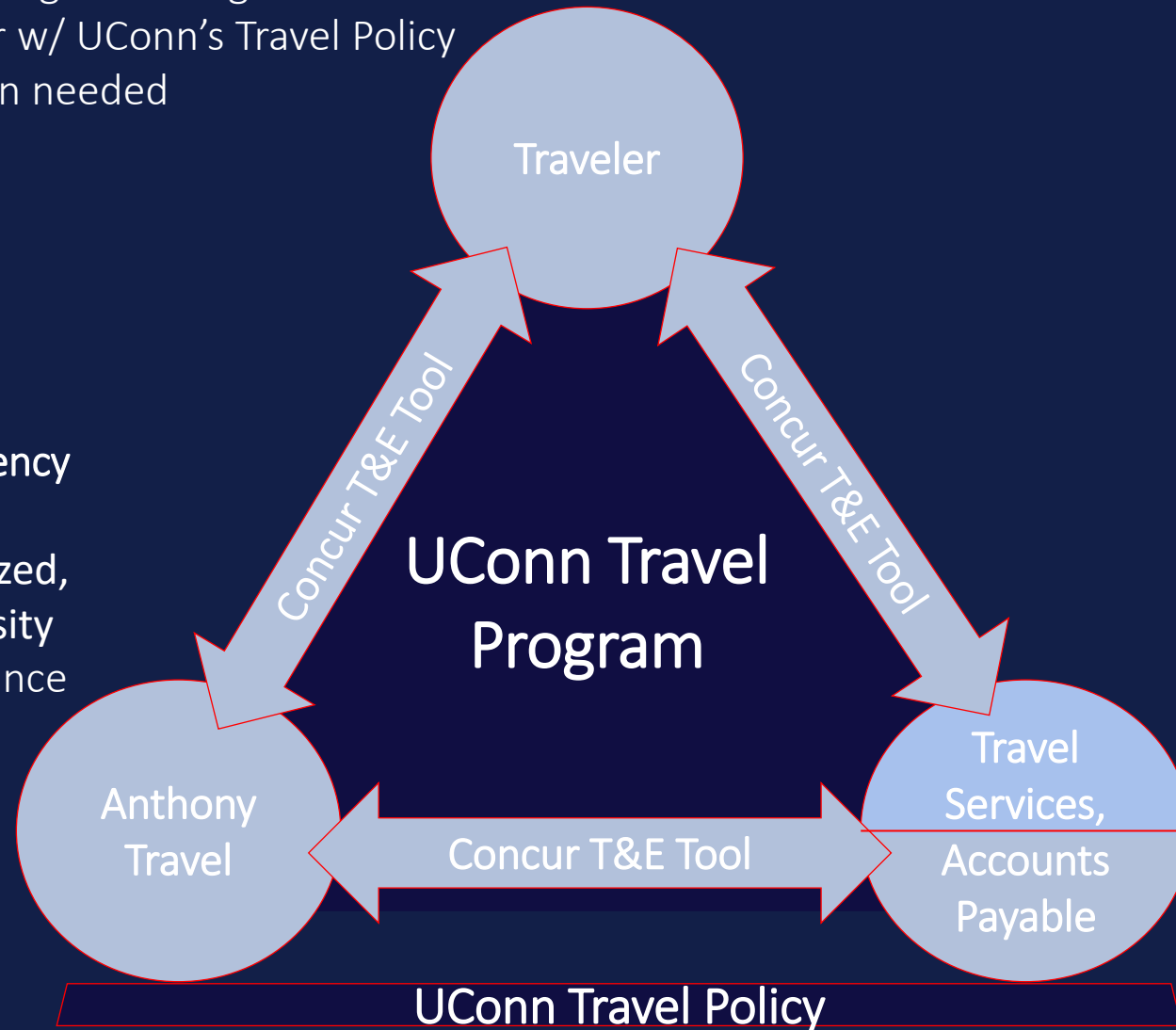
# ELEMENTS OF THE TRAVEL PROGRAM

Traveler supports the program by:

- Using online booking tool or Agent Assist
- Becoming familiar w/ UConn's Travel Policy
- Seeking help when needed

Anthony Travel is the travel agency that supports the program by:

- Handles individual, specialized, and group travel for university
- Industry best practice guidance
- Manages unused tickets



Travel Services & Accounts Payable support the program by:

- Offering assistance to travelers
- Providing training & job aids
- Maintaining effective and efficient process

# TRAVEL FROM START TO FINISH

**Review Travel Policy and apply for Travel Card if needed**



**Log into Concur and update your Concur profile**



**Submit a Request in Concur**



**Book Travel in Concur or directly with Anthony Travel**



**Return from your trip and create your expense report from your approved request**

# WHY DO WE HAVE A TRAVEL POLICY?

The Policy is meant to support the travelers' contributions to the university's mission while assuring accountability for the use of resources for travel.

## Fiduciary responsibility of State Funds

- As an agency of the State of Connecticut, we must respect and safeguard our travel privileges and funds and practice fiscal, ethical, and public responsibility.

# TRAVEL CARD

The University Travel Card is a MasterCard issued by JP Morgan Chase, that reduces the time and effort involved in the expense reporting process for University employees, automates the approval process, and improves reporting. In addition, it is corporate liability and will not affect personal credit.

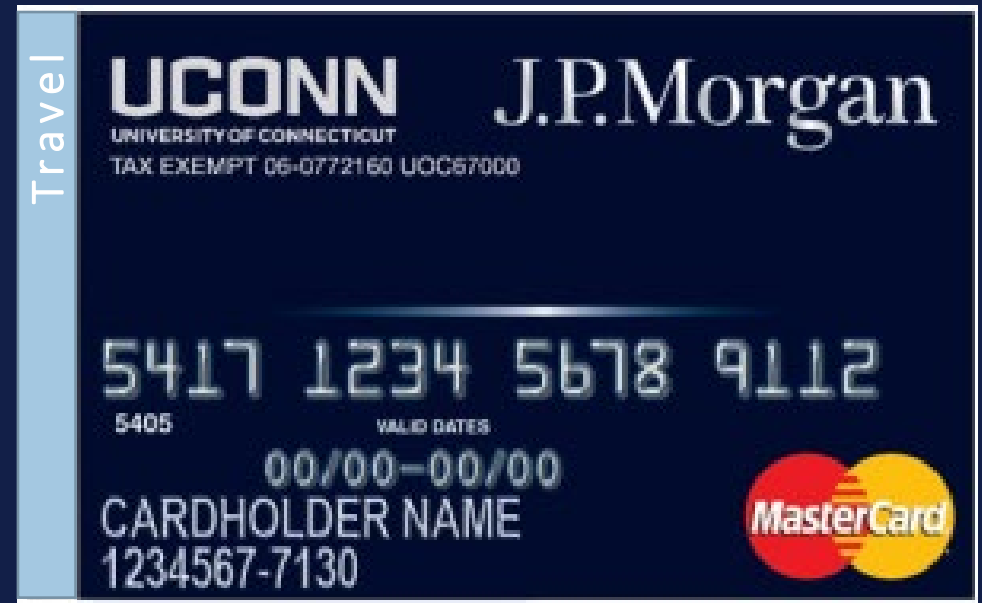
<https://concurproject.uconn.edu/travel-cards/>

## Limits

- Single purchase limit not to exceed \$4,999.99
- Spending limit per month:
  - \$5,000.00 for standard traveler
  - \$10,000.00 for frequent traveler

## Contacts

- Phone 860-486-2289 (option 2)
- Pcard@uconn.edu



# TRAVEL CARD REMINDERS

- Once your Travel Card Request Form is fully approved, it takes 7-10 days to process your card and receive it in our office. We will send you an email when it has arrived and can be picked up.
- Please be aware of your limits. Your limits will reset at midnight on the 23<sup>rd</sup> of each month. If you require an increase, you will need to submit a travel card update request. Increases, once approved, cardholders will be sent an email and the increases are effective immediately.
- If your Travel Card is set to expire, no action is needed. We will receive your new card about a month before expiration and will inform you for pickup. The current card will not expire until the end of the expiration month.
- If you are putting your travel expenses on your Travel Card, you will still need to reconcile those charges in Concur.



# FO & SUPERVISOR CONSIDERATIONS WHEN APPROVING TRAVEL REQUESTS and EXPENSE REPORTS

## Fiscal Officer Approvals

### Travel Requests:

- Review to ensure the correct KFS number is used and there is enough available money
- If approving a travel request for a student, be sure to make a BEC selection before approving

### Expense Reports:

- Ensuring there is enough funds for the trip/expense
- Escalation to Supervisor for several reasons, including:
  - Unusual transactions or items that may be out of policy
  - If Expense report total exceeds the approved request by a substantial amount
  - Personal transactions

## Supervisor Approvals

Determine if the entire trip has a business purpose, is reasonable and benefits the University

# CREATING & SUBMITTING A TRAVEL REQUEST

The Request module will be used by UConn travelers to seek pre-approval for upcoming Travel. Concur pre-approvals will provide an avenue for employees to request travel in an easy-to-use system and allow the fiscal officers the ability to approve the estimated budget for the trip. The request must be fully approved before the start of the trip (for international travel, it must be approved before booking).

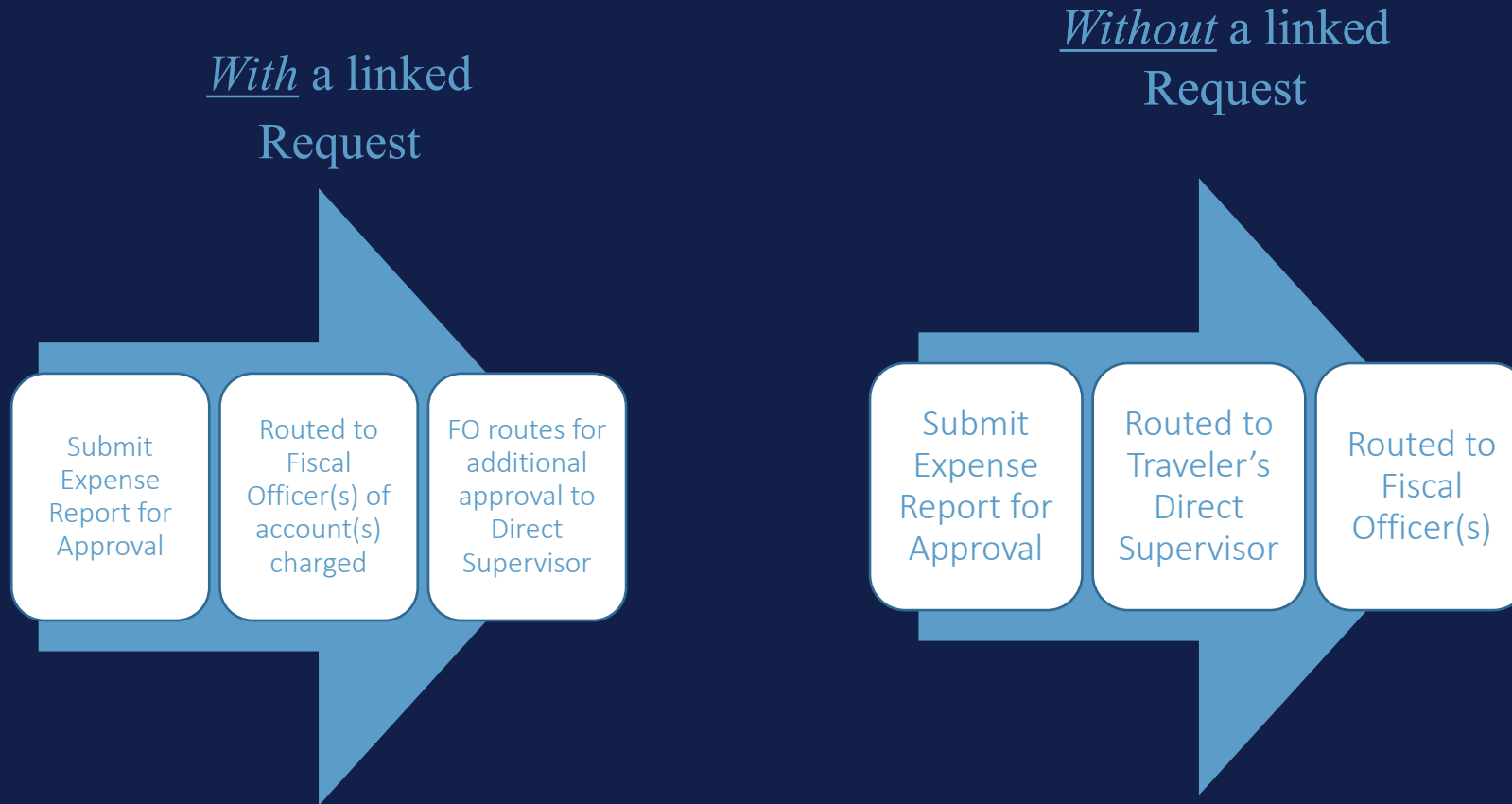
Trip Detail/Segment	Request
Airfare	Required
Hotel	Required
Car Rental	Required
Personal Car Mileage	Recommended
Business Meal	Not Required
Conference Registration Fee	Not Required



- *\*Requests to travel to a banned state, embargo country, and Level 3 or 4 countries/regions will be routed for additional approval (e.g., export control, global affairs)*
- *\*\* Primary supervisor as it appears in CORE-CT*

# CREATING & SUBMITTING EXPENSE REPORTS

- Concur's Expense module is used for entry and approval of all expense reports.
- With the use of "Audit Rules" travelers and approvers will be notified of potential issues when completing and reviewing expense reports. Expense reports should be submitted within 15 days of returning from the trip.



# WAYS TO AVOID TURBULENCE WHEN SUBMITTING EXPENSE REPORTS



- Submit a request and get it fully approved before the start of your trip
- Submit your expense report within 15 days of returning from your trip
- No matter the meal selection, please check off the Use Percent Rule column on your Expenses and Adjustments page
- Pending Transactions that have the source of “E-Receipt” can either be combined with the expense or deleted
- Deduct commute

# WAYS TO MAKE CONCUR WORK FOR YOU!

Concur Mobile App- Take pictures of receipts on the go!

Plans@concur.com- Forward the itinerary here and import it directly into Concur!

Receipts@concur.com- Send receipt pictures directly into Concur!

Receipts@expenseit.com- Automated expense itemization (Great for hotels!)

[Training and Resources](#)

# TRAVEL PROGRAM CONTACT INFORMATION

Contact	Travel and Payment Card Services	Anthony Travel
Website	Travel.uconn.edu	
Phone Number	860-486-2289 (option 2)	860-325-2558 (After Hours number: 800-523-5819)
Email	<a href="mailto:travel@uconn.edu">travel@uconn.edu</a>	uconncampustravel@anthonytravel.com

# CAPITAL PROJECTS AND FACILITIES PROCUREMENT (CPFP)



# LEARNING OBJECTIVES

- Overview of Capital Projects and Facilities Procurement
- Understand the role and responsibilities of CPFPP in the University's procurement process
- Gain knowledge on the basics of CPFPP procurement
- Choose the appropriate CPFPP purchasing methods

# WHO WE ARE

**Joseph Thompson**  
AVP & Chief Procurement Officer

Melanie Savino  
Exec Program Manager

**Lynn Lesniak**  
Director  
Capital Projects & Facilities

Lisa Miezkwicz  
Category Manager  
Facilities & MRO

Shamona Kamm (B2)  
Kathleen Susca (B1)

Cesar Alonzo  
Category Manager  
Construction Services

Griffin Fehrs (B2)  
Christopher Peters (B2)

Buyer I  
*Vacant/Search 497412*

*Vacant/Search in Process*  
Director  
Procurement & Supplier Diversity

*Vacant*  
Category Manager  
Prof & Specialized  
Services

Terri Lessard (B2)  
Jennifer Goodwin (B1)

Kathleen Kearney  
Category Manager  
Research

Dennis Sienna (B2)  
Lupe Arroyo (B1)

Elaine Dumas  
Category Manager  
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Melanie Weed (B2)  
Jill Petrello (B1)

Frank McCabe  
Category Manager  
Business Services

Nancy Patrylak  
Manager - Travel,  
TCard, & PCard

Alyssa Wojcik  
Admin Program Support  
II (Travel)

Katherine Papalionakis  
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Lydia Liburd  
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Exec. Program Dir.  
Supplier Diversity

Victoria Novak  
Admin Program  
Support II

**VACANT**  
Director  
Contracting & Compliance

Laurie Conklin  
Sr. Contract Spec.  
(Const)

Brock Mayfield  
Contract Spec.  
(Construction)

David Williams  
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Jonathan Walker  
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Abigail Gagne

**Temp Support:**  
Jay Balboa (IT)  
Dayja Barker (IT)  
John Gibson (IT)

Sarah Jones  
Admin Svc. Spec.  
Spec Payroll

**David Denuzzio**  
Associate Director  
Center of Excellence

Center of Excellence  
(Project Mgmt., Analysis,  
Technology, Vendor  
Creation)

Thomas DeVito  
Procurement Analyst

BJ Pivonka  
Procurement Analyst

Jeremiah Macht  
Comp Sup Tech II

Sean Martin  
Admin Program Support  
II

Adrienne Gilnack  
Admin Svc. Spec.  
Temp Support

Document Production  
Center

# WHAT WE DO

## Goods and Services We Procure

### ➤ **Construction Services**

- General Contractor/Trade Contractor, Construction Manager
- Including new construction and renovation projects

### ➤ **Professional Services (related to construction)**

- Architects, Engineers, Specialty Consultants (i.e., Haz. Mat., PMO, Commissioning)

### ➤ **Facilities Related Goods and Services**

- Landscaping, Snow Plowing, Janitorial, MRO (Maintenance, Repair, Operations), Utilities, Alternative Energy, Fire Safety and MEP

**HUSKYBUY**

# SPEND UNDER MANAGEMENT BY CATEGORY FY23

Category	Overall Spend
Construction	\$192,177,782
Facilities	\$56,300,949
TOTAL	\$248,478,731

# WHO WE SUPPORT

## Primary Customers

- University Planning Design and Construction (UPDC)
- Facilities Operations (FOBs)
- Information Technology Services (ITS)
- Athletics
- Public Safety
- UConn Health
- Other University Departments (as needed)



# HOW WE PROCURE

## Construction Services



- **On-Call Programs:**
  - \$0-\$100K On-Call Trade/General Contractor
  - \$100K-\$1M On-Call Trade/General Contractor
    - Examples of Trade Categories: Asphalt, Electrical, Flooring, HVAC, Insulation, Masonry, Painting, Plumbing, Roofing, Site Work, Telecommunications
  
- **Annual Prequalification Program:**
  - For Projects with a construction cost greater than \$1 million
  - General Contractor/Trade Contractor/Construction Manager
  
- **Individual Project Prequalification:**
  - For unique Projects with a construction cost greater than \$1 million
  - General Contractor/Trade Contractor/Construction Manager

# HOW WE PROCURE

## Professional Services (related to construction):

### ➤ On-Call Program

- For Projects with a design cost less than \$1 million
- Architects, Engineers, Specialty Consultants

### ➤ Individual Project Prequalification

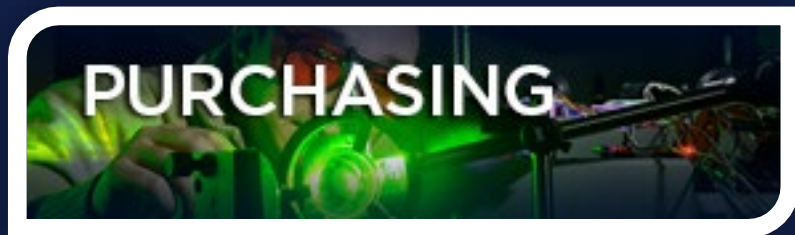
- For Projects with a design cost over \$1 million



# HOW WE PROCURE

## Facilities Goods and Services:

- Invitation to Bid or Request for Proposal for Services
- Master Contracts for maintenance and repair work
  - Examples of Master Contracts: Janitorial, Landscaping, Mechanical, Electrical, Plumbing, Fire Alarms, Sprinklers, Security Systems, Trash & Recycling, and Water Treatment



# FURTHER INFORMATION



- Contact any member of the CPFPP team:
  - <https://ubs.uconn.edu/ubs-staff-directory-2/#staffcpfp>
- Visit our Website:
  - <https://cpfp.ubs.uconn.edu/>
- For a list of CPFPP Commodities:
  - [https://media.procurement.uconn.edu/purchasing/images\\_commodities/Commodity\\_List.pdf](https://media.procurement.uconn.edu/purchasing/images_commodities/Commodity_List.pdf)



**BREAK (10 Mins)**

# PROCUREMENT CENTER OF EXCELLENCE (CoE)



# LEARNING OBJECTIVES

- Understand the role and responsibilities of Procurement CoE in the University's procurement process
- Gain a basic understanding of the Supplier Registration process
- Identify tools and resources to aid in Supplier Registration and HuskyBuy shopping

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Sean Martin  
Admin Program Support  
II

# PURPOSE OF THE COE

To establish and maintain the “infrastructure” of the Procurement organization to enable UBS Staff and its customers do their jobs effectively and efficiently

# HOW DO WE ACHIEVE OUR PURPOSE?

- Operational/Tactical Procurement Support
  - HuskyBuy customer and system support
  - Supplier registration and support
  - Training (UBS Staff/University Community)
- Strategic Procurement Support
  - Technology review and implementation
  - Business process improvement
  - Policy and procedure development

# SUPPLIER REGISTRATION: REQUEST

**HUSKYBUY UCONN** All Search (Alt+Q) 0.00 USD

Suppliers > Requests > My Supplier Requests

My Supplier Requests

**TEST1485485** Print Request History ?

Template **Supplier Request**  
Request Status **Incomplete**

Instructions

Questions

**Overview**

Timeline Overview

Review and Complete

Supplier Request Workflow

### Questions - Overview

**On This Page**

- [Company Information \(7\)](#)
- [Supplier Contact Information \(3\)](#)
- [Requesting Department Information \(4\)](#)

**Company Information**

As a reminder if your vendor is a foreign vendor that requires a wire payment, please remember to fill out the [wire form](#).

Supplier Type \* ?

Company  Individual

Supplier Name \*

TEST1485485

Business Purpose for adding vendor? \*

- Purchase of Goods/Services
- Honorarium
- Refund/Reimbursement Only
- Other
- Edit Current Supplier

Please provide a valid email address for the individual to be invited.

First Name \*

Last Name \*

★ Required < Previous Save Progress Next >

Powered by JAG

# SUPPLIER REGISTRATION: INVITATION AND SETUP

## HUSKYBUY

### Supplier Invitation for University of Connecticut

Dear HuskyBuy Test Supplier,

The University of Connecticut has invited you to register as a supplier

Becoming a University of Connecticut network supplier is free and required for anyone receiving a payment from the University of Connecticut. By selecting the "Register Now" button below, you will be routed to a secure website to complete the registration process. Upon successful completion of your registration, you will have access to your secure portal where you can add additional details about yourself.

Register Now



*Click Here*

Thank You,

HuskyBuy Support Team

If you have any questions, please contact the HuskyBuy Support Team at [HuskyBuysupport@uconn.edu](mailto:HuskyBuysupport@uconn.edu) or 860-486-2289.

# SUPPLIER REGISTRATION: STATUS

 **Massachusetts Envelope Co.**

Supplier Number: 15939-0

Registration Status: In Progress

Registration Type: New Supplier Application

Type:  Preferences: 

Diversity Classifications: DoesNotQualify

Date Registered: 2/16/2019 3:03 PM

Last Updated: 7/12/2019 12:51 PM


**Massachusetts Envelope Co.**

Supplier Number:15939-0

Registration **In Progress** for:  
*University of Connecticut*

**3 of 8** Steps Complete


**Massachusetts Envelope Co.** 

Supplier Number 15939-0  
Registration Status In Progress  
Registration Type New Supplier Application 

[View Supplier Registration](#)

## Summary

### General Supplier Information

Supplier Name	Massachusetts Envelope Co.
JAGGAER Supplier ID	1000863671
Supplier Number	15939-0
Active for Shopping	✓
Supplier Classes	
Search Preference	1
Order Acknowledgment	✗
Advanced Ship Notice	✗
e-Invoicing (CXML Invoicing)	✗
Portal Invoicing	✓

### Supplier Registration Information

Date Registered	2/16/2019 3:03 PM
Invitation Sent to	customerservice@fleetbp.com on 1/23/2019 2:54 PM
Invitation Sent by	<a href="#">Heather Williams-Huang</a> on 1/23/2019 2:54 PM
Last Updated	7/12/2019 12:51 PM
Profile Last Updated by Supplier	2/16/2019 3:03 PM
Registration Method	Solicited
Registration Status	In Progress
Registration Type	New Supplier Application
Supplier Support Contact	<a href="#">Powell, Connie</a>

 [Request New User](#) 

## Welcome

- Company Overview ✓
- Business Details ✓
- Addresses ✓
- Contacts ✓
- Diversity ✓
- Insurance ✓
- Tax Information ✓
- Professional Certifications ✓
- Certify & Submit

About 

**Summary**

General

[Additional Information](#)

[Supplier Classes](#)

[System Settings](#)


[Contacts and Locations](#) 

[Diversity](#) 

[Workflow and Review](#) 

[Legal and Compliance](#) 

[Accounts Payable](#) 

[eProcurement](#) 

# SUPPLIER REGISTRATION: PROCESS FOR SUPPLIER

- A star (\*) denotes required content
- A green checkmark denotes a section where all required information has been completed.
  - Some of these are filled by default, indicating that the section is optional!
- If there is a warning sign for a section, then it still requires fields to be completed.

**HuskyBuy Test Supplier**

Registration Invited for:  
University of Connecticut

**1 of 8** Steps Complete

**Welcome**

- Company Overview ⚠
- Business Details ⚠
- Addresses ⚠
- Contacts ⚠
- Diversity ⚠
- Insurance ✓
- Tax Information ⚠
- Payment Method ⚠
- Certify & Submit

## Welcome to Supplier Registration

Welcome to the University of Connecticut's Supplier Portal

In order to become a University of Connecticut supplier, you must complete the following steps:

1. Create your HuskyBuy account;
2. Complete your supplier registration, including the certification and submit page;

You will be notified when your supplier registration has been approved by the University.

Any questions email [huskybuysupport@uconn.edu](mailto:huskybuysupport@uconn.edu).

### Required to Start Registration


Legal Company Name \*

★ Required to Complete Registration

[Get Started >](#) [Save Changes](#)

# SUPPLIER REGISTRATION: APPROVAL AND FLAGS

**Michelle MacLeod** 

Supplier Number 49871-0  
**Registration Status** **Approved**  
Registration Type Reimbursement/Refund 

[View Supplier Registration](#)

About 

**Summary**

General

Additional Information

Supplier Classes

System Settings

Contacts and Locations 

Diversity 

Workflow and Review 

Legal and Compliance 

Accounts Payable 


eProcurement 

[View History](#)

[View Email Logs](#)

## Summary

### General Supplier Information

Supplier Name Michelle MacLeod  
JAGGAER Supplier ID 1002633287  
**Supplier Number** **49871-0**  
**Active for Shopping** **✓**  
Supplier Classes **REI** **IND**  
Search Preference 4   
Order Acknowledgment **x**  
Advanced Ship Notice **x**  
e-Invoicing **x**  
Portal Invoicing **✓**

### Supplier Registration Information

Date Registered 6/20/2019 5:00 PM  
Supplier Requested by [Jennifer Newman](#) on 6/20/2019 4:10:17 PM  
[View Supplier Request Form](#)  
Invitation Sent to [Michelle MacLeod](#) on 6/20/2019 4:10 PM  
Invitation Sent by [Alyssa Chamberlin](#) on 6/20/2019 4:10 PM  
Last Updated 6/21/2019 11:43 AM  
Profile Last Updated by Supplier 6/20/2019 5:12 PM  
Registration Method Solicited  
Registration Status Approved  
Registration Type Reimbursement/Refund  
Supplier Support Contact [MacLeod, Michelle](#)

# SUPPLIER MANAGEMENT: COMMON PITFALLS AND SOLUTIONS

Common Issue	Solution
Supplier cannot receive e-mail invite from the HuskyBuy	Have Supplier provide a different e-mail address and/or whitelist domains and IPs (CoE can help identify which ones to whitelist)
Supplier has provided incorrect tax information	CoE returns form to Supplier to correct and/or consult with tax professional. All forms must be signed and dated.
Supplier doesn't remember their password to login to Jaggaer Network	Direct Supplier to Jaggaer toll-free number to reset password
The Supplier after repeated attempts cannot receive the link or complete the registration process	Contact Associate Director of CoE to discuss solutions and troubleshoot
Supplier shows as "Approved" but is not active for shopping (red X mark)	Contact CoE- there may be a sync error that can be easily corrected. Also, CoE periodically inactivates Suppliers infrequently used Suppliers. If this is the case, CoE can send registration link so the Supplier can update their profile.
Supplier has completed registration but isn't approved	The status of "Completed" indicates the Supplier has filled out all the forms, but they are still pending review and approval. This takes 1-2 business days, depending on volume and if any corrections are required.

# RESOURCES- CURRENT STATE

## University Business Services

Search this site...

- Home
- About Us
- Supplier Diversity
- Card Services Center
- Resources
- FAQs

**University Business Services**  
University Business Services is a customer-focused organization that is... and expert business support to all customers in support of the University's core mission to promote the educational, research, and clinical missions of One UConn.

- EHS Contractor Manual
- HuskyBuy
- Procurement Card
- Software & Cloud Acquisition & Renewal Process
- Uniform Guidance

University Supplier Diversity Program

Procurement Contracting and Compliance

Capital Projects and Facilities Procurement

Purchasing



### HUSKYBUY

LOGIN

JOB-AIDS

Emergency Purchase Procedure

Contract Status

Tier 2 Supplier Survey

### Contact UBS

860.486.2619

860.486.5051

Directions

8:00 a.m. - 5:00 p.m.

# RESOURCES- CURRENT STATE

purchasing.ubs.uconn.edu/home-2/resources-3/huskybuy/

and Finance Training Sports Gaming Test Environment Writing Supplier Onboarding International Trade... Log in to Whistic Contract Status | Co... SciQuest Inc Web A... Jaggaer Managed F... Legal Files Web© -... All Bookmarks

My Sites Howdy, Denuzzio, David

Home / Resources / HuskyBuy

## HuskyBuy

# HUSKYBUY

**LOGIN**

**Great news!** HuskyBuy has been expanded to a more robust full-suite model. You will be pleased to know that the entire procurement process is now conducted in one system. Users will have a seamless end-to-end experience from procurement to payment through a single environment in HuskyBuy [hosted by Jaggaer]. This expansion provides a mechanism for easy ordering of both catalog and non-catalog product, as well as for the payment of all goods and services. These exciting system capabilities - including improved access through your mobile device - will increase ordering efficiency, standardize approval workflows, provide more accurate spend data, and allow greater visibility into order status and payment.

For more information on how to do what you need in HuskyBuy, see our training job-aid documents below or view our [Entire Job-Aid Guide](#). For additional assistance, our HuskyBuy team is available Monday to Friday from 8:00 am to 5:00 pm. (860) 486-2289 or [huskybuysupport@uconn.edu](mailto:huskybuysupport@uconn.edu). If you are having trouble finding the right job-aid, try using your internet browser's search feature and type in a keyword (*keyboard shortcut Ctrl + F or Cmd + F*).

**TRAINING SLIDE DECKS**

- [HuskyBuy Beginner's Guide](#)
- [Specialty Approver](#)
- [Fiscal Officer and Requester](#)
- [EHS and Equipment Purchases](#)

**REQUISITIONS & PO APPROVALS**

- [Requisition Approval](#)
- [Purchase Order Amendments/Revisions](#)
- [Assign Substitute Approver](#)
- [Splitting Line Items](#)

**USER SETTINGS**

- [Profile Preferences](#)
- [Notification Preferences](#)
- [Adding Favorites](#)

**INVOICE APPROVAL & RECEIVING**

- [Approving Supplier PO Invoice](#)
- [Creating a Quantity Receipt](#)

**SHOPPING**

- [Catalog Shopping](#)
- [Non-Catalog Forms](#)
- [Blanket Order Forms](#)
- [Card Management](#)

**SEARCH FEATURES**

- [Documents](#)
- [Contracts](#)
- [Suppliers](#)

**ROLES & DEFINITIONS**

# RESOURCES-FUTURE STATE

The screenshot shows a web browser window with multiple tabs. The active tab is titled 'Accessing HuskyBuy from the Jaggaer Portal' and the address bar shows the URL 'kb.uconn.edu/space/FPB/26670661715/Accessing+HuskyBuy+from+the+Jaggaer+Portal'. The browser's address bar and tabs are visible at the top. The main content area displays a document with a title 'Accessing HuskyBuy from the Jaggaer Portal' and a subtitle 'Created 6 days ago • 2 min read'. The document text describes the Jaggaer's Total Supplier Manager solution and provides a login link. A yellow callout box contains contact information for Huskybuy Support. Below the text, there is an 'Instructions' section with two numbered steps. At the bottom, a screenshot of the 'JAGGAER SUPPLIER NETWORK' interface is shown, featuring a 'Create Invoice / Credit Memo' form with fields for Invoice No., Invoice Date, Customer, PO Number, and Currency.

Supplier Profile - Bell, Joseph x Kualii Build x using emojis in professional em x logo teams icon - Google Search x Accessing HuskyBuy from the Jaggaer Portal

kb.uconn.edu/space/FPB/26670661715/Accessing+HuskyBuy+from+the+Jaggaer+Portal

SharePoint Home - OneDrive Work Stuff Bills and Finance Training Sports Gaming Test Environment Writing Supplier Onboarding Log in to Whistic Contract Status | Co... SciQuest Inc Web A... Jaggaer Managed Fi... Legal Files Web© ... Qualtrics | Budget, P... HB Test Environment JAGGAER: Projects Sourcing Events Das...

## Finance, Payroll, and Budget

- Asset Panda
  - Cycling Controllable Property (IOS)
  - Surplussing Equipment (Android)
  - Cycling Controllable Property (Android)
- Kualii Financials
  - Accounting
  - Cash Operations and Accounts Receivable
  - Capital Asset Management
  - Chart of Accounts
  - Budget
  - Navigating the Kualii Financials Home Screen
  - Action List / KFS Workflow
- Surplussing Equipment (Apple)
- Payroll
- Faculty Compensation Information
- Faculty Leaves
- HuskyBuy
  - Accessing HuskyBuy from the Jaggaer Portal
  - Setting Your Profile Preferences
  - Setting Your Notification Preferences
  - Adding Favorites
  - Shopping with Catalogs
  - Shopping with Forms
  - Shopping with Blanket Order From

## Accessing HuskyBuy from the Jaggaer Portal

Created 6 days ago • 2 min read

Jaggaer's Total Supplier Manager solution is a self-service portal that enables suppliers to manage all their necessary business information for completing transactions with the University of Connecticut like purchase orders and payments.

When supplier information changes, such as address, tax details (e.g., W9s), or company/individual's name, suppliers must log in to the portal to update this information on their HuskyBuy profile. This ensures that the account information is up-to-date and prevents payments (i.e. checks) from being sent to the wrong location.

Login Link - <https://solutions.sciquest.com/apps/Router/SupplierLogin>




Please contact Huskybuy Support at [HuskyBuySupport@UConn.edu](mailto:HuskyBuySupport@UConn.edu) or 860-486-2289 (option 1) for further assistance if you haven't previously created a login for HuskyBuy.

### Instructions

1. Login with your username and password at the link above.
2. Look for "Customer Portal Access" within your Jaggaer profile and click "University of Connecticut"

The screenshot shows the 'JAGGAER SUPPLIER NETWORK' interface. The top navigation bar includes 'Home' and 'Supplier Portal Home'. The main content area is titled 'Create Invoice / Credit Memo' and features a form with the following fields: 'Type' (Invoice selected), 'Invoice No.', 'Invoice Date' (03/31/2022), 'Customer' (University of Connecticut), 'PO Number' (Optional PO Number), and 'Currency' (US Dollar). A 'Create' button is visible at the bottom right of the form.

# RESOURCES CONTINUED

- HuskyBuy Support Contact
  - Hours of Operation
    - Mon-Fri, 8:30am-4:30pm
  - Contact Methods
    - Email: [HuskybuySupport@uconn.edu](mailto:HuskybuySupport@uconn.edu) 
    - Phone: 860-486-2289 (2BUY) Option 1 
    - Microsoft Teams 

# UNIVERSITY SUPPLIER DIVERSITY PROGRAM (USDP)



# LEARNING OBJECTIVES

- Understand the importance of supplier diversity and inclusion in procurement, on all campuses and at UConn Health
- Understand the Mission and Core Values of the USDP
- Awareness of the eLearning Course, "Embracing Supplier Diversity at UConn" on SABA
- Understand the part that you can play in aiding the success of the USDP and UConn Mission

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Director  
Procurement & Supplier Diversity

**Vacant**  
Category Manager  
Prof & Specialized  
Services

Terri Lessard (B2)  
Jennifer Goodwin (B1)

Kathleen Kearney  
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Research

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Document Production  
Center

# IMPORTANCE OF SUPPLIER DIVERSITY AND INCLUSION

- Supplier diversity is a business strategy that involves the active inclusion of Small and Minority Business Enterprises (S/MBEs) in the development, planning and execution of the University's procurement strategies.
- When the University actively includes S/MBE in our procurement processes, we are not only providing them the opportunity to compete for our business, but also promoting economic growth for their businesses, their communities and our state.

# USDP STATUTORY REQUIREMENTS

- CGS Sec. 4a-60g. Establishes the set aside program for small contractors, minority business enterprises, individuals with disabilities and nonprofit corporations.
- State of Connecticut Agencies (including UConn and UConn Health) and political subdivisions of the State must set aside each fiscal year, after approved exemptions by the Department of Administrative Services, 25% of their budgets for construction, housing rehabilitation, and purchasing supplies and services to be awarded to certified Small Business Enterprises (SBEs), with 25% of this amount to be awarded to certified Minority Business Enterprises (MBEs).

# USDP MISSION AND CORE VALUES

## USDP Mission and Core Values

To expand enrollment and participation of small/minority businesses on University contracts, by facilitating the opportunity for said businesses to provide valuable, quality, timely goods and services, while building mutually beneficial, respectful, lasting business relationships with the University community.

Encouraging  
Participation

Managing Relationships

Educating Contractors/  
Vendors and University  
Community

Measuring Compliance

<https://supplierdiversity.ubs.uconn.edu/>

# USDP CORE VALUES

## Encouraging

Expos and Matchmaker Events  
Panel Discussions  
S/MBE Vendor Showcasing  
Advocacy to Remove Obstacles

## Managing Relationships

State Agency Collaborations  
Stakeholder Engagement  
Legislative Meetings  
Memberships and Committee Participation

## Educating

UConn Outreach Events  
Project Meetings  
SD Website  
Encouraging Corrective Action  
eLearning Course - SABA

## Measuring Compliance

Goal setting  
Reporting  
Tracking Results  
Determining Means of Improvement

# EMBRACING SUPPLIER DIVERSITY AT UCONN

The USDP has developed an e-learning course to inform our communities about the University's commitment and expectations regarding supplier diversity and inclusion on our UConn campuses and at UConn Health.

It is intended that through the course, you will come to understand the importance of partnering with the USDP efforts to increase S/MBE participation in our procurement processes.

The screenshot displays the UConn Supplier Diversity eLearning Course interface. At the top, the UConn logo is visible with the tagline "LEARNING + WORK". Below the logo is a navigation bar with links for "Home", "Me", "My Team", and "Admin". The main content area features the course title "UConn Supplier Diversity eLearning Course" with the ID "ID: PR0001". A "Course description" section follows, stating: "Embracing Supplier Diversity at UConn - a USDP eLearning Course". Below this, a message reads: "To our University Purchasing Decision-Makers and Contractors - Thank you in advance, for taking this course. It is designed to demonstrate UConn's commitment and intentionality toward providing an inclusive Procurement environment for Small and Minor... more...".


The course player interface is shown below, titled "UConn\_SupplierDiversity\_Final.v12". It includes a "Menu" on the left with options like "Supplier Diversity", "Welcome", "Course Navigation", "Course Audience", "Course Objectives", "A Message from the Executive P...", "MODULE 1: Understanding Supp...", "MODULE 2: History & Facts", "MODULE 3: Importance & Benefits", "MODULE 4: Summary & The Par...", and "Thank You". The main video player area shows the UConn seal and the text "Embracing Supplier Diversity at UConn - Critical to our Core Vision and Economic Future". The video is 20-30 minutes long. The player includes a search bar, a progress bar, and a "NEXT" button. The interface is powered by SABA.


# MANAGING RELATIONSHIPS


- USDP has developed an on-line tool to assist S/MBEs in connecting to our Buying Professionals in Procurement Services.
- After utilizing this tool, S/MBEs are placed on our **"Prospective S/MBE Contractors/Vendors/Consultants"** page, making their company and contact information accessible to our UConn Community.


Prospective S/MBE Contractors/Vendors/Consultants


DAS Characteristic Reference


 CONNECTICUT BUSINESS  CTB


 DISABLED BUSINESS  DISBE

 WOMEN BUSINESS  WBE

 MINORITY BUSINESS  MBE

 SMALL BUSINESS  SBE

 OTHER S/MBE CERTIFICATE  OTHER

Company Name	Contact	Capability Statement	Commodity/Service Offering	DAS Characteristics
<a href="#">Alvarez Industries LLC</a>	<a href="#">Lenny Alvarez</a> (203) 401-1152		Advertising and Marketing Services, Construction, Construction-Related Services, On-Call Trade and General Contractors Programs,	 MBE

# MEASURING COMPLIANCE

- The USDP regularly reports UConn's S/MBE utilization achievements for all of its campuses and UConn Health. Fiscal Year Summaries can be viewed on the USDP website, under "Measuring Compliance;" and they are also included as part of the Office of Institutional Equity (OIE) annual Affirmative Action Plan filings.

**SMALL MINORITY BUSINESS ENTERPRISE QUARTERLY REPORT - for Reporting Capital Improvement Expenditures**  
 Please Submit a copy of this form and Back-Up Sheets via InterOffice Mail to CHRO @ 25 SIGOURNEY ST, Hartford CT 06106

Fiscal Year Quarter: **1ST / 2ND / 3RD / 4TH** Fiscal Year Period: **6/30/2018**

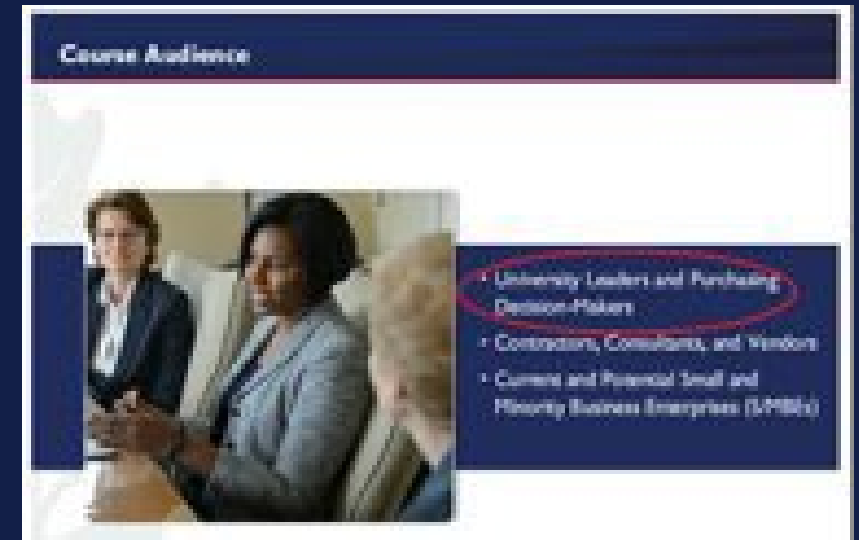
ENTER THIS QTR- 4TH

Agency Name: University of Connecticut Agency Number: 7301  
 Prepared by: Veronica F. Cook E-mail: veronica.cook@uconn.edu  
 Address: [veronica.cook@uconn.edu](mailto:veronica.cook@uconn.edu)  
 Tel. # - 860-486-0990

1) TOTAL CAPITAL IMPROVEMENT FUNDS AVAILABLE FROM YOUR ADOPTED BUDGET		\$ 198,532,301.87		
Page 1 (Summary Page) From The Annual Goals Calculations Report				
	TOTALS (\$)	Contracts	TOTALS (\$)	Contracts
2) Total Agency FY Capital Improvements Expenditures for Purchases from Small and Minority Contractors.	\$11,679,955.72	220	\$50,709,400.49	1,174
Combined TOTALS OF SBE AND MBE EXPENDITURES				
3) Total Agency FY Capital Improvements Expenditures for Purchases and Contracts from Minority Business Enterprises (MBE) only.				
PLEASE CATEGORIZE:				
A) American Indian (NI)	\$19,196.54	1	\$166,157.06	11
B) Asian (A)	\$46,960.68	6	\$649,620.62	49
C) Black (B)	\$619,230.49	18	\$4,138,973.66	100
D) Disabled Individual (D)	\$21,895.92	2	\$396,314.95	13
E) Hispanic (H)	\$21,020.00	2	\$284,197.30	12
F) Iberian Peninsula (I)	\$167,690.62	1	\$379,835.39	3
G) Disabled American Indian (DNI)			\$0.00	0
H) Disabled Asian American (DA)			\$0.00	0
I) Disabled Black American (DB)			\$0.00	0
J) Disabled Hispanic American (DH)			\$0.00	0
K) Disabled Iberian Peninsula American (DI)			\$0.00	0
L) Woman (W)	\$2,582,077.24	59	\$14,822,855.12	193
M) Woman American Indian (NWI)	\$6,341.39	1	\$105,061.34	3
N) Woman Asian (AW)	\$210,282.59	3	\$249,289.20	10
O) Woman Black (BW)	\$2,000.00	1	\$6,000.00	3
P) Woman Disabled (DW)			\$0.00	0
Q) Woman Hispanic (HW)	\$0.00	0	\$88,437.90	1
R) Woman Iberian Peninsula (IW)	\$13,632.32	1	\$273,010.31	9
S) Disabled American Indian Woman (DNWI)			\$0.00	0
T) Disabled Asian American Woman (DAW)			\$0.00	0
U) Disabled Black American Woman (DBW)			\$0.00	0
V) Disabled Hispanic American Woman (DHW)			\$0.00	0
W) Disabled Iberian Peninsula American Woman (DIW)			\$0.00	0
DisBE TOTAL (Lines D, G, H, I, J, K, P, S, T, U, V, & W)	\$21,895.92	2	\$396,314.95	8
WBE TOTAL (Lines L - W)	\$2,814,333.54	65	\$15,544,653.87	214
MBE TOTAL (Lines A - W)	\$3,710,327.79	95	\$21,559,752.85	356

# THE IMPORTANT PART YOU PLAY

- As an end user, cardholder, etc., you are considered a “University Leader and Purchasing Decision-Maker,” who has been granted the privilege of transacting business on behalf of the University. Your intentionality in making purchasing decisions for your respective department contributes to the University’s overall S/MBE utilization goals and outcomes, which are established by and reported to the State of Connecticut Department of Administrative Services (DAS) and Commission on Human Rights and Opportunities (CHRO). Aside from the statutory requirements, you are also asked to consider the potential economic impact to our surrounding communities based on the decisions that you make.



# USDP RESOURCES TO ASSIST YOU

- To assist you in finding S/MBEs, when deciding where to make your purchases, we have included links to a few sites where both State and Federal S/MBEs can readily be found. These links are located on the USDP website, under “SMBE Resources.”
- HuskyBuy also offers a list of State and Federally-certified SMBEs. These can be accessed through the HuskyBuy Link provided at <https://purchasing.ubs.uconn.edu/>.

The image shows two screenshots. The left screenshot is the UConn Procurement Services Supplier Diversity page. It features a navigation menu with 'Supplier Diversity' selected. A dropdown menu is open, showing options like 'DAS Supplier Diversity Program', 'CHRO Contract Compliance', 'SBA', 'HEDCO', 'GNEMSDC', 'Entrepreneurial Center', 'CT PTAP', 'Regional S/MBE Outreach Event', and 'Prospective S/MBE Contractors/Vendors/Consultants'. The 'DAS Supplier Diversity Program' and 'Prospective S/MBE Contractors/Vendors/Consultants' are circled in red. The right screenshot is the BizNet search interface for Small/Minority Companies. It includes a search bar, a 'Search' button, and a 'View All' button. The 'View All' button is circled in red. Red arrows point from the circled items in the left screenshot to the corresponding circled items in the right screenshot.

Department of Administrative Services (DAS) Supplier Diversity Program Database

Prospective S/MBE Contractors/Vendors/Consultants

# USDP CONTACT INFORMATION

Veronica Cook, Executive Program Director

**Email:** [veronica.cook@uconn.edu](mailto:veronica.cook@uconn.edu)

**Phone:** (860) 486-0990

Victoria Novak, Administrative Services Specialist II

**Email:** [victoria.novak@uconn.edu](mailto:victoria.novak@uconn.edu)

**Phone:** (860) 486-2614

**USDP Webpage:** <https://supplierdiversity.ubs.uconn.edu/>

**USDP Email:** [supplierdiversity@uconn.edu](mailto:supplierdiversity@uconn.edu)

# PROCUREMENT CONTRACTING AND COMPLIANCE (PC&C)



# LEARNING OBJECTIVES

- Understand the role and responsibilities of UBS Contracting and Compliance professionals in the University's procurement process
- Review the University contract lifecycle and elements essential to each of its phases
- Understand the importance of addressing business terms early in the process to protect the University's interests and expedite contracting timeline
- Understand the implication of signing contracts on behalf of University
- Review resources available on Contracting website.

# WHO WE ARE

**Joseph Thompson**  
AVP & Chief Procurement Officer

Melanie Savino  
Exec Program Manager

**Lynn Lesniak**  
Director  
Capital Projects & Facilities

**Vacant/Search in Process**  
Director  
Procurement & Supplier Diversity

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# CONTRACTING AND COMPLIANCE RESPONSIBILITIES

## Contracting and Compliance:

Institutional risk review

Legal, regulatory and University policy compliance

Contract negotiations

OGC/OAG submissions

Contract status notification

Assist procurement/stakeholder with contract selection and strategy

# REVIEW OF CONTRACTS

<b>Preapproved Templates</b>	<b>Office of General Counsel review of the legal terms of contracts is required when:</b>	<b>Office of the Attorney General review of the legal terms of contracts is required when:</b>
Pre-approved templates/form agreements do NOT require further legal review unless modifications have been made to the agreement	The actual or estimated value of a contract is \$25,000 or more	The actual or estimated value of a contract is \$500,000 or more

# WHAT ARE THE IMPLICATIONS OF SIGNING A CONTRACT?



Signing a contract on behalf of UConn may have legal implications for the individual signatory and for the University. Therefore, contracts signed without obtaining legal approval may, if the University chooses not to honor the contract, result in personal liability for the individual who signs the contract.



University administrators, faculty, staff or students who enter into unauthorized agreements may also be subject to disciplinary action, up to and including dismissal.

# WHAT IS A UNIVERSITY CONTRACT?

A University “contract” is any written agreement, which creates a University obligation, whether or not it is entitled “contract.”

An agreement may be a binding contract even though one party provides something of value to the other party at no charge (i.e., a Deed of Gift to the University). Therefore, the University may have an interest even though there is no financial transaction.



# SIGNATURE REQUIREMENTS

University Board of Trustees' resolution grants the President with signing authority for all University Contracts and grants authority to delegate such signing authority  
(See [President's Delegation of Contract Approval and Signatory Authority for the Storrs, Regional Campuses, Law School, and School of Social Work \(2023.03.20\)](#))

Only those individuals named in the President's contract signing authority are authorized to sign on behalf of the University

# TYPES OF CONTRACTS

Types of Contracts include, but are not limited to:

Professional Service Agreement

Goods and Services Agreements

Communication Agreement

Construction and Facilities Contracts

Maintenance and Repair Contracts

Memorandum of Understanding/Agreement

Real Property Related Transactional Documents

Lease Agreements

Rental Agreements

License Agreements

Loans

Research & Laboratory Agreements

Insurance Policies

Collaboration Agreements

Waiver/Release

Facilities Use Agreements

# ROLES IN BUSINESS TERM NEGOTIATION

Stakeholder Department	Category Manager	Buyer	Contract Specialist
<ul style="list-style-type: none"><li>• Settles business terms.</li><li>• Considers regulatory/policy compliance</li><li>• Monitors vendor performance</li><li>• Contract Administration</li><li>• Provide overall procurement goals/objectives</li></ul>	<ul style="list-style-type: none"><li>• Develops purchasing strategies/plans for departmental needs (present/future), executing on plans, and sustaining their respective categories.</li><li>• Managing vendor and department relationships</li><li>• Consults department and industry benchmarking resources to advise on strategy, market conditions, industry practices, and available contract vehicles.</li></ul>	<ul style="list-style-type: none"><li>• Collaborate with Contract Specialist to select purchasing vehicle (e.g., contract, PO, etc.)</li><li>• Determines if and when to engage Business Analyst and/or Contract Specialist.</li><li>• Ensures business term accuracy</li><li>• Issues Purchase Order when contract vehicle is finalized.</li></ul>	<ul style="list-style-type: none"><li>• Advise on contract type</li><li>• Reviews business terms with Buyer and advises on best contract vehicle to memorialize business terms.</li><li>• Drafts and negotiates legal terms in contract.</li><li>• Memorializes settled business terms in contract.</li><li>• Manages contract execution.</li><li>• Secures Office of General Counsel and State Attorney General review and approval (where applicable).</li></ul>

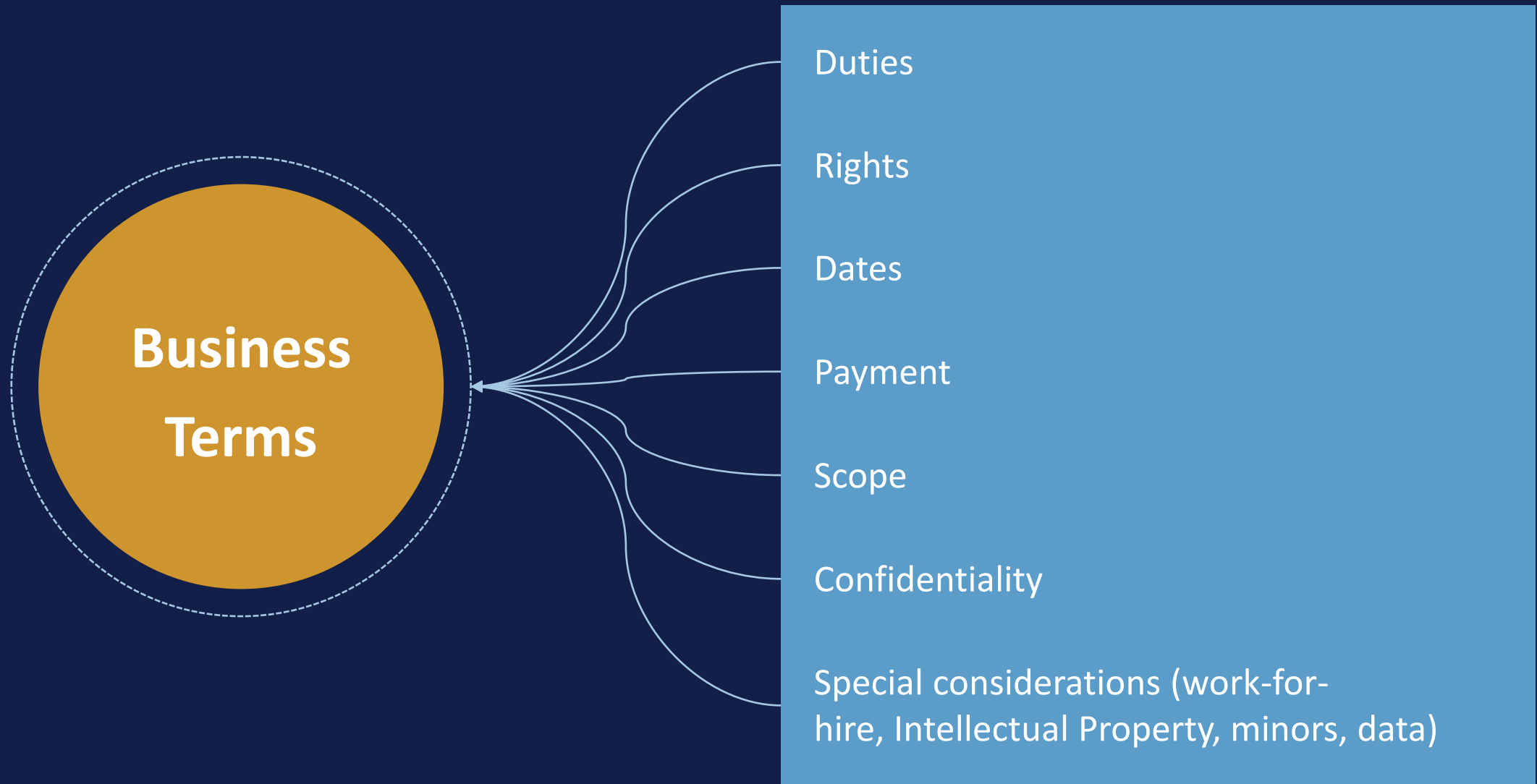
# CONTRACTING PHASES BY CONTRACTING DIVISION

Contracting Phase	
1.	Allocation
2.	Assessment
3.	Business Discussions
4.	Drafting
5.	Buyer/Dept. Draft Review
6.	PSA Administration
7.	Internal/Legal Revisions
8.	Negotiations
9.	Vendor Review
10.	Vendor Revisions
11.	Assemble for Vendor Execution
12.	Vendor Execution
13.	Assemble for University Execution
14.	University Execution
15.	Assemble for OGC/OAG Review
16.	OGC/OAG Review
17.	OGC/OAG Revisions
18.	Close-out

# HOW LONG DOES THE CONTRACTING PROCESS TAKE?

Step in Contracting Process	Average Time (business days)
File Assessed to Ensure Business Terms Provided	5
Unaddressed Business Terms are Developed (when not previously negotiated)	19
Contract is Drafted	3
Vendor Review	6
Legal Terms are Negotiated	2
Contract is Executed by Vendor	4
Contract is Executed by University	3
Office of the General Counsel (for contracts over \$25k)	5
Attorney General Reviews (for contracts over \$500k)	25
TOTAL:	72

# BUSINESS TERMS



# TECHNOLOGY SOLUTIONS

IT Software and Cloud-hosted Solutions have special considerations.

- EULA (End User License Agreements)
- SaaS (Software as a Services)
- Software and Cloud services Acquisition and Renewals ordering process (questionnaire)

[Software-and-Cloud-Services-Acquisition-and-Renewals-Process.pdf](#)  
[\(uconn.edu\)](#)

- Licensing models: per named user, per FTE, per processor

# WHAT PROVISIONS SHOULD NOT BE INCLUDED IN UNIVERSITY CONTRACT?

## Attorney Fees

The state cannot agree to pay any attorneys fees.

## Governing Law

UConn cannot agree to be governed by another state's or country's law, or to resolve a dispute in another state's or country's courts (venue).

## Indemnification of any party

UConn cannot agree to indemnify or hold harmless another party.

## Confidential Information

UConn's ability to keep information confidential is limited by the Connecticut Freedom of Information Act.

# CONTRACTING WEBSITE RESOURCES



[Independent Contractor vs. Employee](#)



[Where Minors are Involved](#)



[Contract Status](#)



[Contract and Compliance Services Website](#)

# HOW TO EXPEDITE THE CONTRACTING PROCESS

Engage with Procurement as soon as possible.

Ensure that all business terms are agreed upon between University and vendor.

Be available for review of contract drafts and provide prompt responses to questions regarding the specifics of the goods and/or services the vendor is providing to the University.

# PC&C CONTACT INFORMATION



Website:

<https://contracting.ubs.uconn.edu/>



Email:

[ubscontracts@uconn.edu](mailto:ubscontracts@uconn.edu)

# PROCUREMENT COMPLIANCE AND INSURANCE



# LEARNING OBJECTIVES

- Consider compliance with all public procurement requirements and with ethical obligations of a state agency
- Understand the importance of ethics and integrity in public procurement
- Learn about basic insurance and risk management mitigation strategies related to procurement
- Understand the need for insurance and the types of coverage available to the University

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# COMPLIANCE & INSURANCE OVERVIEW

## Compliance:

- All University suppliers must comply with State of Connecticut ethics regulations. These regulations exist to ensure that public agency employees do not misuse their public employment for personal gain.
- Our division endeavors to ensure compliance with the collection of required supporting documentation for contracts (Non-Discrimination Certifications, Ethics forms).

## Insurance:

- Assist with provision review; ensuring sufficient requirements and coverage limits; coverage description and additions for certain University-owned assets, certificates of insurance

# RESTRICTED SUPPLIERS



State ethics rules prohibit payment to current employees and former employees

“Suppliers” are not only vendors; they can be recipients of awards, grants, fellowships or other payments. Departments need to work with the Ethics office and Human Resources prior to making such award or grant to a potentially restricted individual.

Former University Employees, Affiliates and State of Connecticut employees are all subject to strict ethics regulations that we all must comply with. Suppliers self-identify during their HuskyBuy registration.

# ETHICS COMPLIANCE

## Contracts with the State:

Employees, their immediate family members, and/or a business with which an employee or his/her family member is associated may not enter into a contract with the state valued at \$100 or more, unless the contract has been awarded through an open and public process. The Office of State Ethics has ruled that immediate family members may not be hired as an independent contractor unless there has been an open and public process.

## Options for Compliance:

- Explore the possibility of paying the person via special payroll or a Personal Services Agreement
- Work with a procurement professional and run a bid for the goods/services

# OTHER PROCUREMENT COMPLIANCE MATTERS



Agreements and amendments to contracts must be "timely." Services may not commence prior to Board of Trustees approval, as required, and the execution of a contract or amendment

It is the position of the Attorney General that no expired contracts can be revived or other otherwise amended. Further, services cannot start prior to the execution of a contract, or continue after a contract for the same has expired.

# WHAT IS COMMERCIAL GENERAL LIABILITY INSURANCE?



Commercial General Liability (CGL) insurance is insurance carried by organizations to protect them against liability. This insurance typically covers claims for bodily injury (BI) and property damage (PD) arising out of premises, operations, products, and completed operations; and advertising and personal injury (PI) liability.



## Why should we require a vendor to carry CGL insurance?

- Our contracts with vendors generally require them to indemnify the University. The CGL insurance serves as part of the financial backing for that liability.
- Should a vendor cause damage, the University can go straight to the vendor's insurance company with a claim as long as the University is named as an Additional Insured on a Certificate of Insurance (COI).



## What do we ask the vendor to provide as evidence of insurance?

- The University should require a vendor to provide us with a Certificate of Insurance (COI).
- The University of Connecticut and its Board of Trustees and their agents, officers and employees should be named as Additional Insured with the proper endorsements made to the insurance policy and evidenced on a COI.

# WHAT SHOULD I LOOK FOR ON A CERTIFICATE?



When reviewing a certificate of insurance, look for the following:

MAKE SURE THE POLICY IS IN EFFECT (TERM)

MAKE SURE THE LIMITS MATCH ANY CONTRACT REQUIREMENTS

MAKE SURE THAT ALL REQUIRED COVERAGES ARE SHOWN (e.g. CGL, AUTO, UMBRELLA, WORKER'S COMPENSATION AND PROFESSIONAL LIABILITY )

MAKE SURE THAT THE DOCUMENT DOES NOT CONTAIN LANGUAGE THAT ALLOWS FOR INDEMNIFICATION BY THE UNIVERSITY OR WAIVES THE UNIVERSITY'S SUBROGATION RIGHTS

If you have questions about a supplier's coverage, please reach out to Eric Blumenthal  
[Eric.Blumenthal@uconn.edu](mailto:Eric.Blumenthal@uconn.edu)

# UConn – Insurance

As an agency of the State of Connecticut, UConn relies upon sovereign immunity, primarily, as a defense to claims.

The State does carry some specialty policies (athletic injury, liquor liability, etc.)

UConn equipment, with a value of \$250k or above, is covered under the State's property policy. The policy has \$1.0M deductible.

UConn can only name another party as an Additional Insured where required by written agreement

If another party causes damage to University property, contact Compliance & Risk Management as soon as possible

# COMPLIANCE/INSURANCE CONTACT INFORMATION

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# QUESTIONS

