

Duke Procurement & Supply Chain Management

Purchasing Goods and Services at Duke



Purchasing Goods and Services at Duke

- Reasons/results of review and update
- Updated GAPs
- Updated Forms
- Procurement Website changes
- Contacts for questions/help



Reasons for Review and Update

- Request from RACI to simplify the acquisition and payment for services
 - Address challenges with international purchases
 - Address challenges with domestic purchases
 - Continue to meet legal requirements associated with independent contractor status and sponsored research funds
- Need documentation of the process for purchasing goods



Results of Review and Update - Overview

- New GAPs
 - GAP 200.370 – Purchasing Services on Sponsored Funds
 - GAP 200.371 – Purchasing Services on Admin./Non-Sponsored funds
 - GAP 200.372 – Purchasing Goods on Sponsored Funds
 - GAP 200.101 – Sole Source Justification for Purchases on Sponsored Funds
 - Required only for goods/services on sponsored funds > \$10,000
 - Exclusions from SSJ: hotel, events, conference hosting, rent, scientific advisory board
- New Forms
 - Term Sheet
 - Sole Source Justification Form
 - Domestic and International RSSA (\$10,001-\$100,000)
 - OSA (non-sponsored terms)



Results of Review and Update - Overview

- Simplified process
 - No longer requiring certificate of insurance and being named as a co-insured for purchases less than \$100,000 (still required for high risk contracts that Procurement executes)
 - Eliminates the waiver request process for Risk Management for these types of purchases Note: Still requires insurance but removing request to have certificate (COI) on file at Duke
 - Shortened all forms except for long version RSSA (Services greater than \$100,000)
 - Shortened set of terms and conditions for purchased services below \$100,000



Results of Review and Update - Specific

- GAP 200.370 - Purchasing Services on Sponsored Funds within the US (Domestic)
 - Less than \$2,500
 - No PO or RSSA required
 - A/P check request, ICC
 - \$2,501 - \$10,000
 - Buy@Duke shopping cart, no contract required
 - Term sheet (fillable form) with ICC, no SSJ form
 - \$10,001 - \$100,000
 - Buy@Duke shopping cart
 - Domestic RSSA (\$10,001-\$100,000) - Shorter version of contract with relevant terms for sponsored funds
 - ICC, SSJ required when applicable
 - Greater than \$100,000
 - Buy@Duke shopping cart
 - Domestic RSSA (>\$100,000) – Longer version with appropriate Riders, ICC, SSJ



Results of Review and Update - Specific

- GAP 200.370 - Purchasing Services on Sponsored Funds Provided Outside the US (International)
 - Less than \$10K
 - No purchase order or RSSA required
 - A/P check request
 - \$10,001 - \$100,000
 - Buy@Duke shopping cart
 - International RSSA (\$10,001 - \$100,000) - Shorter version of contract with relevant terms for sponsored funds
 - Greater than \$100,000
 - Buy@Duke shopping cart
 - International RSSA (>\$100,000) - Longer version with appropriate Riders



Results of Review and Update - Specific

- GAP 200.371 - Purchasing Services on Non-Sponsored Funds
 - Domestic
 - Less than \$2,500 – A/P check request, ICC
 - \$2,500 - \$10,000 – Term sheet, ICC
 - \$10,001-\$100,000 – OSA (non-sponsored terms), ICC
 - Greater than \$100,000 – OSA (non-sponsored terms, ICC)
 - International
 - Less than \$10,000 – A/P check request
 - \$10,001-\$100,000 – OSA (non-sponsored terms)
 - Greater than \$100,000 – OSA (non-sponsored terms)



Results of Review and Update - Specific

- GAP 200.372 - Purchasing Goods on Sponsored Funds
 - Competitive Bids/Sole Source
 - Ordering Process (SAP Buy@Duke)
 - Special Commodities and Ordering
 - Capital Equipment
 - Radioactive substances
 - Animals
 - Controlled substances for animal use



Procurement Website Changes

<https://finance.duke.edu/procurement>

- Instructions
 - How to Procure and Pay
 - Soliciting Bids
 - Purchasing Goods and Services
 - Making Payments
- Links to GAPs
 - 200.101 – Sole Source Justification
 - 200.370 – Purchasing Services on Sponsored Funds
 - 200.371 – Purchasing Services on Non-Sponsored Funds
 - 200.372 – Purchasing Goods on Sponsored Funds
- Links to Forms
 - Term Sheet
 - Sole Source Justification Form
 - Domestic RSSA (\$10,001-\$100,000), Domestic RSSA (>\$100,000) & Riders
 - International RSSA (\$10,001-\$100,000), International RSSA (>\$100,000) & Riders
 - Outside Services Agreement (non-sponsored terms)
- Contact information



Contacts for Help

- Procurement
 - Dean Freck – Director of Contracting, University Products and Services
 - Michele Meece – Sourcing Manager, Professional Services
 - Ed Sharpe – Director of Research Procurement
 - Duke Procurement Main Number: 919-681-5900
- ORA/ORS

