

New Contract Policy & Process

Obtaining Review & Approval

Contract Team

Things to know upfront:

- All purchase transactions require University-issued purchase orders.
- A purchase order *is* a contract; however, if a contract becomes necessary, the vendor should use RU's Vendor Service Agreement.
 - *Vendors should be strongly discouraged from making changes to the RU's purchase order and/or service agreement.*

Things to know upfront (cont):

- You must also allow a minimum of 30 business days to process contracts that are not on a University contract template.
- It is imperative that you plan ahead and allow sufficient time to comply with the following contracting procedure.

Steps to Receiving Contract Approval

You'll be asked to provide the following:

| | |
|-----------------|-------------|
| Product/Service | Description |
| Cost | Comments |
| Vendor | Signatures |

Steps to Receiving Contract Approval

Contract Submission Request

Section 1 Overview & Your Responsibilities:

- Ensure OC&P has the final, fully executed version of the agreement.
- Monitor deliverables* and contract movement, not limited to; perpetual renewals, renewal terms, & vendor performance.
- Notify OC&P regarding vendors who are potentially in breach of contract.

** Deliverables: goods or services produced as a result of a project that is intended to be delivered to a customer, e.g., reports, documents, software, upgrades or any other building block of an overall project.*

Steps to Receiving Contract Approval

Contract Submission Request

Section 2 Request

- Requester
- Title
- Department
- FOAPAL

Steps to Receiving Contract Approval

Contract Submission Request

Section 3 Vendor

- OC&P ensures that the vendor chosen is approved for use by the State of New Jersey. If you do not know the Vendor's unique Banner ID #, please stop here and contact vendors@rowan.edu.
- Vendor Name
- Banner ID#

Steps to Receiving Contract Approval

Contract Submission Request

Section 4 Contract

- Description
- Commodity
- Contract Start Date & End Date
- Cost
- Contract Upload
- Is this contract part of a master or other existing agreement?

Steps to Receiving Contract Approval

Contract Submission Request

Section 5 Additional Requirements

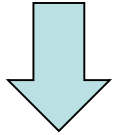
- Req or PO
- Sole Source Approval
- BOT Resolution
- Previous Contract
- Do you have necessary IT Approvals?
- Is there an applicable E-commerce Solution?
- Does Risk Management need to review?

What happens next?

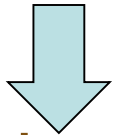
1. Contracting office reviews submission for:
 - All compliance
 - All necessary approvals
 - Contract language
2. Releases for signature
3. Once signature is obtained, you receive the signed version via email.

Business as usual: Banner

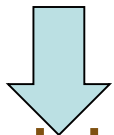
- Fully Executed Contract



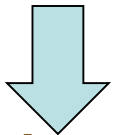
- Requisition



- Purchase Order



- Receiving



- Invoice (Prompt Payment Act)



Lastly

- 90 days after your Contract End Date, you will receive either a Vendor Scorecard or a KPI to complete.
- Scorecards are generally used for products whereas KPIs will be used for services rendered.

Vendor Scorecard

For internal use only

| | | | |
|-----------|--|---------------------|---------------|
| Vendor | | Total Points Earned | Overall Score |
| Banner ID | | | |
| Date | | | |

| Category 1: Performance | | | | | | | | |
|-------------------------------|--|----------|----------------------|--------------------|--------------|-------------------------------------|----------------------------|-------|
| Item | Description | Weight % | A | B | C | D | E | Score |
| Pricing | Vendor's price relative to competitors. | 10% | Exceeds Expectations | Meets Expectations | Satisfactory | Needs Improvement | Does Not Meet Expectations | |
| | Does vendor offer discounts? | 10% | Exceeds Expectations | Meets Expectations | Satisfactory | Needs Improvement | Does Not Meet Expectations | |
| Quotes | How quickly does supplier return quotes? | 10% | Within Hours | Same Day | > 24 Hours | > 48 Hours | 60+ Hours | |
| | How long are quotes valid? | 5% | 90+ Days | 31-59 Days | 30 Days | 14-30 Days | Less than two weeks | |
| Delivery | Are deliveries made within quoted timeline? | 5% | Always | Almost Always | Sometimes | Almost Never | Never | |
| | Are orders delivered in whole? | 5% | Always | Almost Always | Sometimes | Almost Never | Never | |
| Quality | Quality of products or services received. | 5% | Exceeds Expectations | Meets Expectations | Satisfactory | Needs Improvement | Does Not Meet Expectations | |
| System | How user friendly is the Vendor's ordering system? | 5% | Exceeds Expectations | Meets Expectations | Satisfactory | Needs Improvement | Does Not Meet Expectations | |
| Total % Available in Category | | | 55% | | | Total % Supplier Earned in Category | | |

| Category 2: Customer Service | | | | | | | | |
|-------------------------------|--|----------|----------------------|--------------------|--------------|-------------------------------------|----------------------------|-------|
| Item | Description | Weight % | A | B | C | D | E | Score |
| Question Response | Vendor's responsiveness to questions. | 10% | Within Hours | Same Day | > 24 Hours | > 48 Hours | 60+ Hours | |
| Complaint Response | Vendor's responsiveness to complaints. | 10% | Exceeds Expectations | Meets Expectations | Satisfactory | Needs Improvement | Does Not Meet Expectations | |
| Knowledge | Vendor's knowledge regarding their service and how it relates to RU. | 5% | Exceeds Expectations | Meets Expectations | Satisfactory | Needs Improvement | Does Not Meet Expectations | |
| Total % Available in Category | | | 25% | | | Total % Supplier Earned in Category | | |

| Category 3: Incidents | | | | | | | | |
|-------------------------------|---|----------|--------|---------------|-----------|-------------------------------------|-------|-------|
| Item | Description | Weight % | A | B | C | D | E | Score |
| Incidents | How common are incidents with Vendor? | 10% | Always | Almost Always | Sometimes | Almost Never | Never | |
| | Are you satisfied with their conflict resolution process? | 10% | Always | Almost Always | Sometimes | Almost Never | Never | |
| Total % Available in Category | | | 20% | | | Total % Supplier Earned in Category | | |

| Score Weighting | |
|-----------------|---------|
| A | 90-100% |
| B | 80-89% |
| C | 70-79% |
| D | 60-69% |
| E | < 59% |

When in doubt,
call OC&P and ask to speak with a team
member.