

CONTRACT SERVICES

2024 Spring Training
Procurement & Payment Services

April 25, 2024



A background image showing two hands in business attire signing a document. One hand is holding a pen, and the other is holding the document. The image is dimmed and serves as a backdrop for the text.

Contract Services

- End of Fiscal Year Guidance
- Procurement Planning Timeline
- Contract Requests
- Documents to Attach to Contract Request
- Short Form vs. Independent Contractor Agreement
- Contract Signature Policy
- Dos & Don'ts for Contracts
- Coming Soon: Updated Contract Administration Policy

End of Fiscal Year Guidance- Contracts

- **Deadline: April 30, 2024**
- All new Contract Review Requests and Renewal Requests should be submitted in BuyLU by April 30th to ensure successful contract completion followed by requisition submission. Contracts will be worked in the order they are received.
- NOTE: Last-minute requests may place your department's other contracts already in the queue at risk – please review what your needs are and submit them today. When in doubt reach out proactively to your Contract Administrator before you submit.



Procurement Planning Timeline

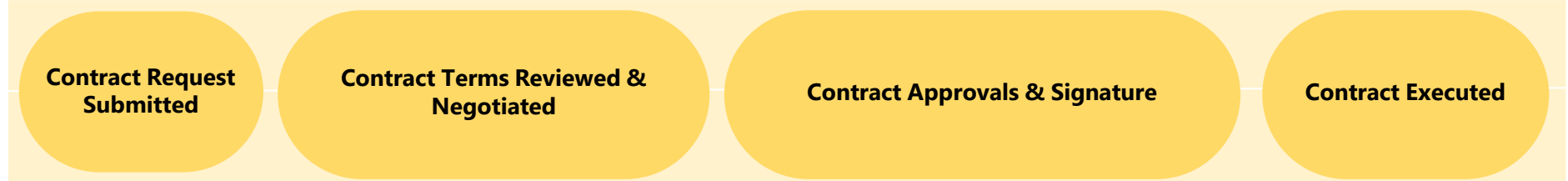
Supplier

Typical processing time: 1-3 business days



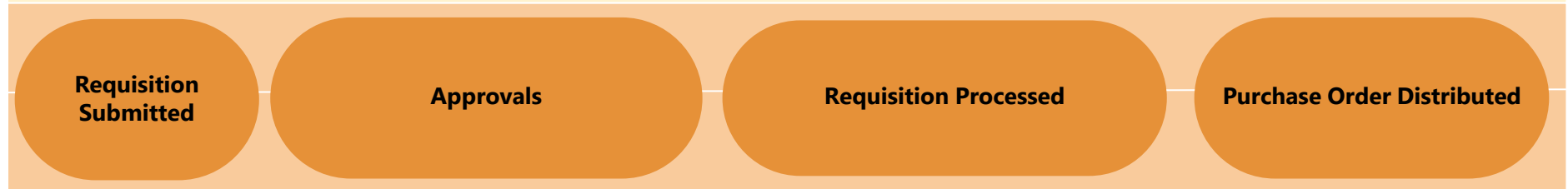
Contracts

Typical processing time: 30+ business days



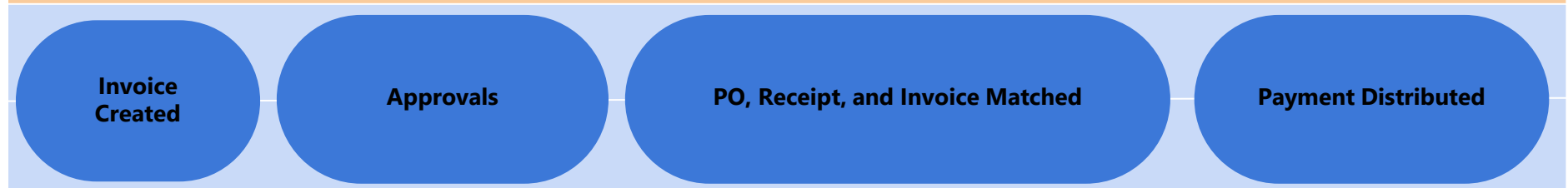
Purchasing

Typical processing time: 1-3 business days

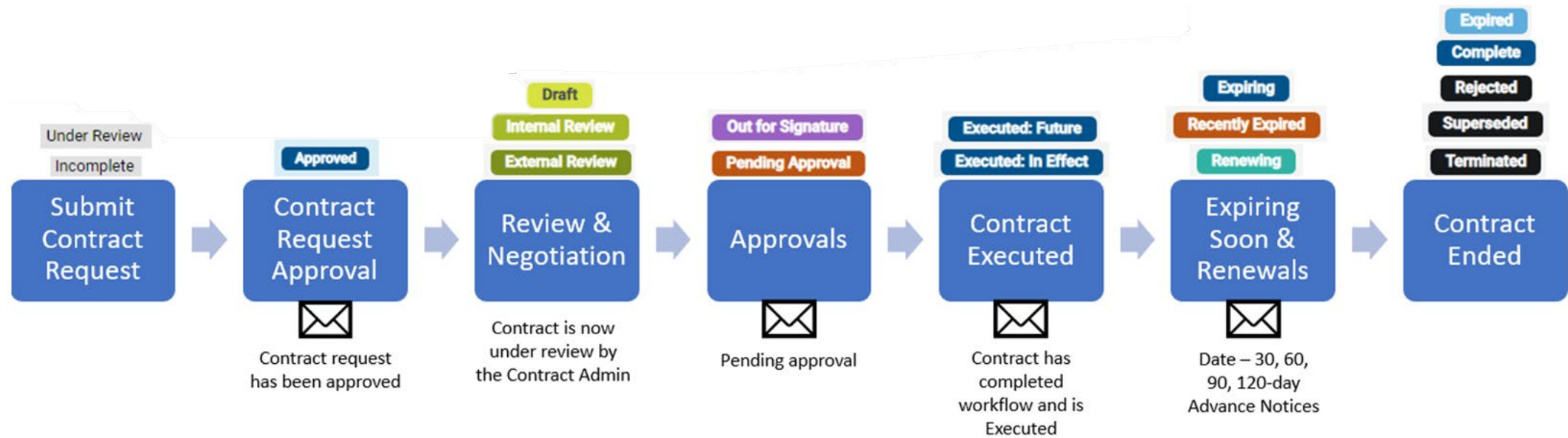


Invoicing

Typical processing time: 1-3 business days



Contract Requests



- **When to submit a contract:**

- Any document with terms & conditions or a link to terms & conditions must be submitted in BuyLU
- Submit contract request prior to requisition. A Contract Administrator will inform you when you can submit the requisition
- Submit at least 30-45 days prior to need-by-date or contract start date

- **Documents needed when a request is submitted:**

- Contract or Quote with Terms
- When applicable: Bid Matrix or Sole Source Form
- Any exhibits or documentation accompanying the contract
- Certificate of Insurance

Documents to Attach to the Contract Request

- Master Agreement (i.e. MPA, SOW, ICA, or any document with terms & conditions)
- Supporting documentation (i.e. exhibits, quotes, Riders, drawings, emails, etc.)
- Certificate of Insurance
- For Sole Source:
 - Sole Source justification form
- Competed Purchases/Services over \$10,000
 - A competitive bid matrix



Short Form (SFC) vs. Independent Contractor Agreement (ICA)

Short Form Contract

- 2 Short Form Contracts currently available:
 1. Short Form for Guest Speakers
 2. Short Form for Game Officials
- Both require the signed Independent Contractor Questionnaire from HR.
- The Short Form for Miscellaneous Services is no longer in use.
- SFC does not need to go through Contracts. The SFC and the ICQ can be attached directly on a requisition to be processed. The Buyer will countersign the SFC.

Independent Contractor Agreement

- Independent Contractor Agreement Process & Policy: <https://www.liberty.edu/human-resources/manager-tools/independent-contractor-process-and-policy/>
- This requirement/process is based on federal and state laws that have IRS implications.
- ICA & ICQ must be submitted into BuyLU as a new contract request to be processed.
- Please do not have the ICA signed by the vendor prior to the CA review.
- The Contract Administrator will countersign the ICA.

Signature Policy

- The Board of Trustees on April 16, 2021 gave specific individuals signature authority to sign and enter into contracts on behalf of the University:
 - **The President**
 - **Chief Financial Officer**
 - **Designated Procurement & Payment Services personnel**
- **Unless delegated in writing by the President or CFO, no one else is authorized to sign.**
- **Notices to proceed (“NTP”) are in effect using a signature authority and are violations of the signature policy.**
- **Please, do not sign any contract on behalf of Liberty University.**
- **Students are not authorized to sign anything on behalf of the University.**
- Submit all contracts to the Contracts Team through BuyLU. Quotes with terms & conditions attached or linked also need to be reviewed by the Contracts Team.



Sparky Says:

Do

Plan ahead & submit your contracts at least 30+ days in advance of need-by-date.

For any service/purchase over \$10,000 make sure to attach a competitive bid matrix to the contract request.

Include Contract Record number (i.e. LIB#) on requisition in the specific field labeled "Associated Contract Number"

Monitor your departmental approval workflow queues on the contract record & requisition to ensure the contract is processed in a timely manner.

Don't

Do not sign anything on behalf of the University. This includes verbal/written (email) authorizations or Notice to Proceed.

Do not allow students to sign or bind the University to any contract.

Do not submit the requisition prior to the CA informing you to do so.

Do not submit a contract that does not have approved funding.

Please do not have the ICA signed by the vendor prior to the CA review.



Coming Soon: Contract Administration Policy

- **Competition:** Purchases over \$10,000 require either a completed Bid Matrix form or a signed Sole Source Justification form to be attached to the contract record. Having an MPA in place does not negate the competition requirement.
- **Term:** The maximum allowable term for any contract - including options for renewal – without requiring additional Board approvals, is five (5) years.
- **Auto Renewal:** Auto renewal terms are not acceptable. All renewals must be included in a contract as an option with a defined notification period. (E.g. "Liberty University shall have the option to renew for twelve (12) month successive terms with a 60-day prior written notice.")
- **Supplier Scorecards:** We are looking to implement an annual Supplier Performance Scorecard in BuyLU that can be done on any vendor who has a PO and/or contract. Specific thresholds are being determined. More to come on this at a later date.

Thank You
Q&A



Contact Us



Purchasing Services

- procurement@liberty.edu
- (434) 592-3012

Enterprise Sourcing

- enterprisesourcing@liberty.edu
- (434) 592-5058

Contract Services

- contracts@liberty.edu
- (434) 582-7839

Payment Services

- acctspay@liberty.edu
- (434) 592-3166

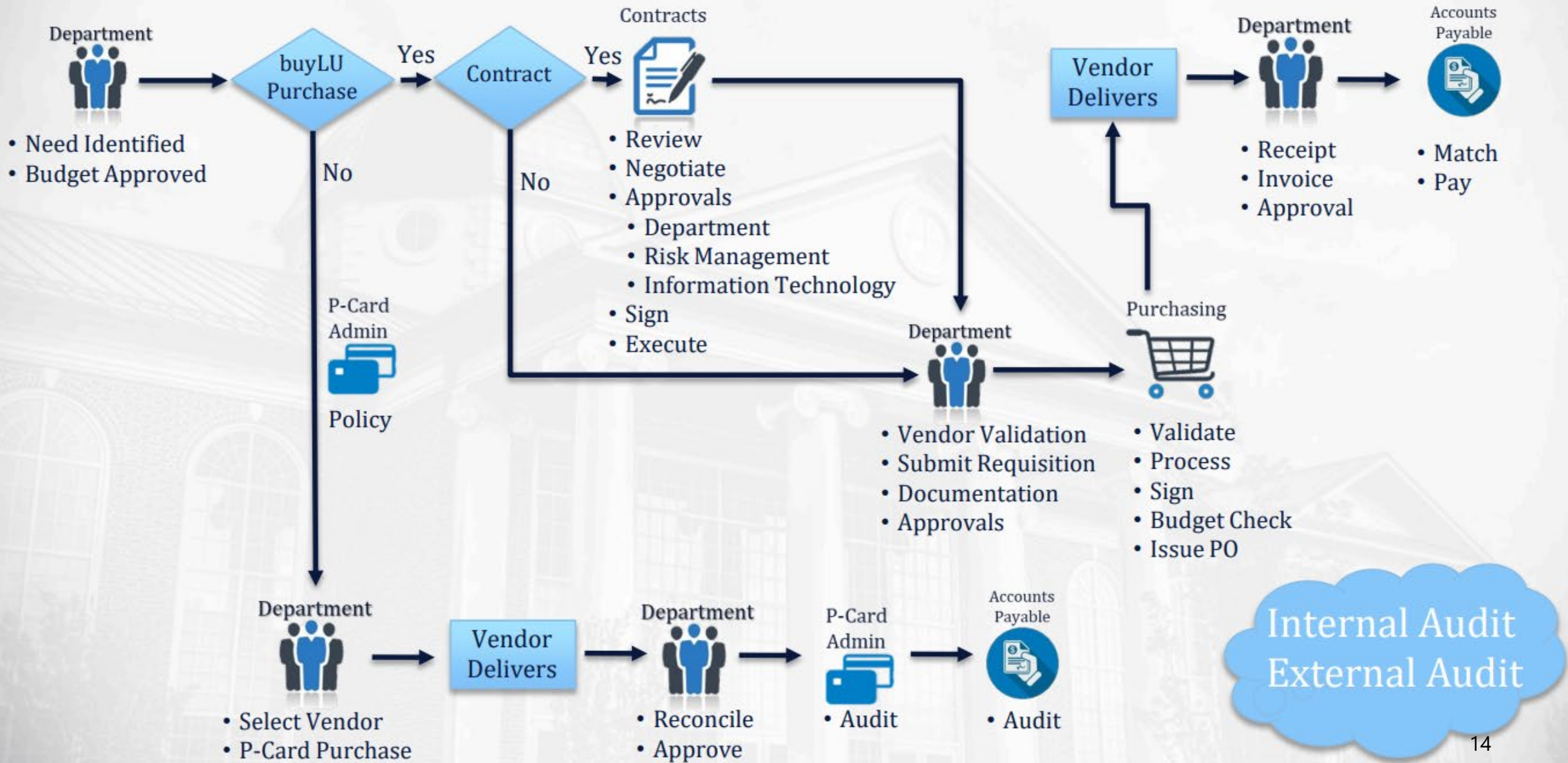
P-Card Services

- pcard@liberty.edu
- (434) 582-2266

Travel Services

- travel@liberty.edu
- (434) 582-8760

Procure-to-Pay (P2P) Walk Through



Procurement Planning Checklist

PROCUREMENT PLANNING CHECKLIST

Use this checklist to keep track of all required documentation and forms required for your purchase.

- **Procurement Policy & Forms** are located on the Procurement & Payment Services website:
www.liberty.edu/finance-admin/procurement/policy-forms/
- **Got questions?** Contact Procurement by email or phone:
 - Email: procurement@liberty.edu
 - Phone: (434) 592-3012

SUPPLIER

- ☐ Check to see if supplier is registered in BuyLU: Suppliers > Search for Supplier
- ☐ If you need a new supplier, request one by going to BuyLU > Suppliers > Request > Request New Supplier
- ☐ New supplier request requires current year W-9 and COI (if required)

CONTRACT

- ☐ Ensure supplier is registered in BuyLU. If not, submit a supplier request before submitting contract request
- ☐ Submit contract request in BuyLU
- ☐ Quote
- ☐ Agreement (contract, terms & conditions, etc.)
 - ☐ If ICA, need ICA and ICA Questionnaire
- ☐ COI (if required)
- ☐ Supporting Documentation (as needed)
- ☐ Receive request from Contract Administrator to submit requisition

CREATE A REQUISITION

- ☐ Determine whether purchase can be made via a BuyLU catalog. If not offered via catalog, submit non-catalog requisition
- ☐ Confirm supplier is active in BuyLU. If not, Request New Supplier
- ☐ If a contract is involved, submit new contract request in BuyLU. Wait for request from Contract Administrator to submit requisition
- ☐ Submit non-catalog requisition
- ☐ Attach corresponding documentation (Quote from vendor, contract, statement of work, proposal, etc.)
- ☐ For requisitions valued at over \$10,000, multiple formal bids are required. For promotional products, multiple formal bids are required, and the threshold is reduced to \$1,000

RECEIVING

- ☐ Once item arrives, create receipt on PO in BuyLU

PAYMENT

- ☐ Instruct vendor to email invoices to Payment Services at acctspay@liberty.edu