



NU Dollars & Sense

QUARTERLY NEWSLETTER OF PURCHASING RESOURCE SERVICES
NORTHWESTERN UNIVERSITY

Purchasing Resource Services (PRS) Web Site

Our goal is to get departments and schools into the habit of checking the PRS web site first at www.univsvcs.northwestern.edu/Purchasing whenever something needs to be purchased. You will find the latest information on new contracts, agreements, policy, etc.

Tax-Exempt Clarification

PRS keeps information related to Northwestern's tax-exempt status in Illinois, as well as several other states on file. If a department or school needs proof of our tax-exempt status, our advice is as follows:

- An official purchase order should be issued to vendors for all University purchases, which includes tax-exempt information on the back (blanket orders should not be created to be utilized as an open account with a vendor).
- A form is included on the PRS web site for individual purchases that most vendors will accept (https://snap.it.northwestern.edu/proxy/proxy.cgi/nauthn/html/univsvcs/tax_exempt.doc), which includes appropriate approval information.
- PRS can send the official Illinois Tax-Exempt Certificate (or the official certificate from other states where NU is tax-exempt) directly to vendors that do not accept either of the above. We do not provide the official Illinois tax-exempt letter to departments and schools.
- Purchases must be for University use only in order to be tax-exempt and cannot be for personal use.

Our tax-exempt status is a very serious issue and we must protect the integrity of how it is utilized, due to the potential for abuse.

Supplier Diversity

Northwestern University is committed to the goal of enhancing economic opportunities for minority-owned, woman-owned, disadvantaged and local business enterprises (M/W/D/LBEs). To support this goal, Northwestern has established a Supplier Diversity Program which is managed by Purchasing Resource Services. In order to stay informed regarding this important initiative, Northwestern interacts with several groups, most notably the Chicago Minority Business Development Council (CMBDC) and the Women's Business Development Center (WBDC).

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The WBDC certifies woman-owned business enterprises (WBEs) and also provides great networking opportunities, business services, and information for women entrepreneurs. The University is a member of WBDC. PRS recently represented the University at the annual Entrepreneurial Women's Conference at Navy Pier on September 13, 2005, which is sponsored by the WBDC. Having a booth at the Conference enables the University to meet potential and current

WBE suppliers. This year was no exception. Helping John Marshall, the University's Manager of Supplier Diversity at the booth were three Supplier Diversity Counselors from other departments and schools at the University (pictured right). We met more than 50 potential WBEs that represent a wide variety of products and services that we hope to be able to recommend to end users in the near future.



Left to right: Jim Konrad, Director of Purchasing; Amy Wilde, University Relations; Hedy Ratner, Co-President WBDC; Will Higgins, Office of Research Operations & Planning; John Marshall, Purchasing Resource Services

Policy/Procedure Updates

As stated in our previous newsletter, there will no longer be a single SSJ/Bid Documentation Form. Going forward, every purchase order of \$25,000 or more will need to be accompanied by either the Bid Documentation Form (BD-1) or the Sole Source Justification Form (SSJ-1). Each form was developed as a downloadable PDF form that could be filled out electronically and printed. Unfortunately, we had to limit the number of characters that could be typed into each box and an electronic copy of a completed form could not be saved.

We have now even further improved the forms by re-creating them as Word documents. All of the existing text is locked; however, you can fill in the appropriate information in each box. The box will expand to fit more text, and you can now save an electronic copy of a completed form.

The new forms are available now. The deadline to begin using the new forms has been extended until January 3, 2005. The forms can be accessed at the following locations:

[www.univsvcs.northwestern.edu/
Purchasing/forms.html](http://www.univsvcs.northwestern.edu/Purchasing/forms.html)

[www.northwestern.edu/finsys/
forms/formmenu.htm](http://www.northwestern.edu/finsys/forms/formmenu.htm)

Info Sessions

General Purchasing

On October 11 and 12, PRS provided a general overview of the purchasing environment at Northwestern University. It was extremely well attended—almost 50 people on each campus, and the feedback has been great! The primary topic was the restructuring of the PRS web site and where to find information on the web site. It also gave us an opportunity to talk about some of our current projects, such as defining the primary responsibilities of PRS, policy clarifications, definitions that have been developed, contracts that have recently been established, templates and terms established for use by departments and schools, our newsletter, and upcoming events. Our goal is for people to get used to going to the web site first, whenever they need to purchase something. This is an info session that we intend to do regularly. A copy of the PowerPoint presentation from this session is available on the PRS web site at www.univsvcs.northwestern.edu/Purchasing/events.html.

If a school or department is interested in having PRS come out and do a general purchasing presentation to your group, please contact Jim Konrad, Director of Purchasing to schedule.

Newly Established Contracts

On November 15 and 16, PRS invited all four of the vendors that we have recently established Preferred Vendor Contracts with to come in and give a short presentation regarding the contract and the product or service that they provide. They were also available to answer any specific questions and to begin the process of signing up interested departments and schools. Again, the session was very well received. The following vendors were present:

- [Arrow Messenger](#) - Messenger Service
- [Nestle Ice Mountain](#) - Drinking Water Service
- [Genesis Technologies](#) - Recycled Toner Cartridges and Printer/Fax Maintenance
- [Shred-It, Inc.](#) - Document Destruction

All of the above contracts were established as a result of a formal competitive solicitation. Departments and schools are encouraged to utilize Preferred Vendor Contracts, as it has been determined that they represent the best value to the University.

Upcoming Info Session Schedule

Legal and Risk Management Issues

December 13 10:00 to 11:30 Wieboldt Hall Rm 727 Chicago Campus	December 14 10:00 to 11:30 University Library Forum Room Evanston Campus
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New Preferred Vendor Contracts

No new contracts have been established since the August 2005 newsletter. To view a list of all current Preferred Vendor Contracts go to www.univsvcs.northwestern.edu/Purchasing/preferred_list.html.

New Non-Exclusive Pricing Agreements

No new pricing agreements have been established since the August 2005 newsletter. To view a list of all current Non-Exclusive Pricing Agreements go to www.univsvcs.northwestern.edu/Purchasing/nonexclusive_list.html.

Travel

COMPASS is Northwestern University's online booking tool. It is highly recommended to departments and schools because it is the most cost effective way to make travel arrangements. It can be reached via the Travel Services web site at: www.univsvcs.northwestern.edu/travel/online.htm.

COMPASS is designed for the majority of users who book round-trip travel. For multi-city bookings, please work directly with travel agents at Tower, Four Corners, or IntraWorld.

COMPASS is a real-time ticketing system, which means that the ticket that you are booking is available at the advertised price if you purchase it immediately. Other online agencies, such as Orbitz, may only update their

system every couple of hours or so, and the advertised fare may no longer be available.

COMPASS now also offers additional savings because the \$5.00 booking fee is being waived from November 1, 2005 to May 31, 2006 when you charge business travel to a CUFS account.

Anyone with access to COMPASS can also become a Travel Arranger or assign others to make travel arrangements for her/him. Please follow the instructions located at

www.univsvcs.northwestern.edu/travel/pdf/travelarranger_instructions.pdf.

Please direct any questions or feedback regarding travel to Jeff Levin at 1-5993 or jhlevin@northwestern.edu.

Upcoming Contracts and Agreements



Below are some of the other products and services that PRS is working on establishing contracts or agreements for:

Product/Service	Tentative Implementation Date
Preferred Vendor Contracts	
Coffee Service	Winter Qtr 2006
Chicago Hotels	Winter Qtr 2006
Moving Services (Commercial) for the Chicago campus	Winter Qtr 2006
Office Furniture	Spring Qtr 2006
Non-Exclusive Pricing Agreements	
HP Printers	Winter Qtr 2006

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We're on the web!

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Welcome

It is with great pleasure that we announce Devi Patel has joined Purchasing Resource Services as a Procurement Administrator. She comes to us from the Kellogg School of Management - James L. Allen Center, where she had worked since 1995. She has considerable purchasing experience, as well as experience working in CUFS, and we look forward to her help in establishing more contracts and agreements for use by departments and schools at the University.

