

End Users' Guide to Procurement

University of Maryland, Baltimore
Strategic Sourcing and Acquisition Services



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Version Number	Date of Change	Purpose of Change
1.0	February 2026	New Document
1.1	March 2026	Final SSAS Review

Section I: INTRODUCTION

Prelude

The intention of this document is to help University of Maryland, Baltimore (UMB) end users gain a general understanding of the procurement process.

Applicability

UMB has two Procurement groups, Construction and Facilities Strategic Acquisitions (CFSA) (construction and facilities related procurement), and SSAS (all other goods and services). This document is applicable to procurements under SSAS's purview.

Section II: INFORMATION ABOUT SSAS

About Us

SSAS Supports multiple campus functions including Procurement, Mail Services and Fleet Services, Warehouse, and Surplus Property. Our procurement team consists of two buying teams, Supplier Diversity and Procurement Operations, including PCard & reporting.

Office Hours

SSAS works a hybrid schedule and generally our staff is on site Tuesday's, Wednesday's, and Thursday's. We welcome in person visits; however, we ask that you arrange that in advance of arriving at our office.

Communications

SSAS staff are expected to communicate with their end users in a way that is efficient, effective and serves our stakeholders in a professional and friendly manner. As each circumstance and need to communicate is unique Procurement staff and end users should choose the most effective communication method for the individual situation and information being conveyed.

All written communication in any form including email, chat, MS Teams notes, is subject to applicable records retention and transparency laws. This means most communications are open to the public upon request. Transcriptions or recordings of video conferences / calls are considered part of the public record with the same requirements as above.

To ensure best communication practices with our end users, SSAS staff is encouraged to use these communication methods prescribed below.

1. Telephone: Department employees have access to technology that allows them to access their individual department phone remotely on their laptop (such as Webex Unified Calling). Employees are expected to answer and make calls when teleworking as if they were in the office.

2. Voicemail: Shall be checked when indicator light or icon appears showing there is a new message. An extended absence greeting shall be left whenever an employee is out of the office for more than one day. Whenever practicable, calls shall be returned the same day.
3. Email: Shall be checked with the same frequency as Voicemail and responded to appropriately within the same time frame as for phone and Voicemail. Email is currently the most frequent method of communication and may be used as a document of record when “written” documentation is required.
4. Video Conferencing / Calls: Microsoft Teams can be used for formal and informal video conferencing and video calling. Consent to record a video conference / calls or use AI Notetakers is required.
5. Chat Features: Microsoft Teams is the official chat/messaging app for the department.
6. Letters: When used, letters shall be on the appropriate departmental letterhead and in proper business letter format (not Memo style) when formally communicating outside of the University System. Letters can be distributed hardcopy or electronically as appropriate.
7. Communication Documentation: Documentation shall be made of telephone calls, personal visits, voicemails, etc. whenever the subject matter of the conversation is necessary to include in the procurement file or other official records.

Section III: GENERAL PROCUREMENT GUIDELINES

Procurement Methods

For purchases other than PCard, the SSAS Buyer will select the appropriate Procurement Method from the table below.

Method	Dollar Range	Typical Process
Simplified Procurement Procedures	Under \$5,000*	<ul style="list-style-type: none"> • PCard (See PCard User's Guide for more info) or • Requisition with quote <ul style="list-style-type: none"> ○ Issue PO
	\$5,000 - \$25,000*	<ul style="list-style-type: none"> • Requisition with quote <ul style="list-style-type: none"> ○ Issue PO
	\$25,000 - \$200,000	Request For Quotes (RFQ)
Competitive Sealed Bidding	Over \$200,000	Invitation For Bids (IFB)
Competitive Sealed proposals	Over \$200,000	Request For Proposals (RFP)
Sole Source	Above \$25,000	<ul style="list-style-type: none"> • Sole Source Justification • Buyers' determination • Price analysis over \$200,000
Emergency	Any	<ul style="list-style-type: none"> • Emergency determination • Make purchase • Complete documentation
Unsolicited	Any	Seek guidance from AVP SSAS
Cooperative Purchasing Agreements	Any	<ul style="list-style-type: none"> • Validate the Cooperative Purchasing Agreement and follow the guidelines of the Chancellor's Directive on Cooperative Procurement. <ul style="list-style-type: none"> ○ Issue PO
Contracts Established by Other Institutions or Agencies	Any	<ul style="list-style-type: none"> • Validate the Contract and follow the guidelines of the Chancellor's Directive on Cooperative Procurement. <ul style="list-style-type: none"> ○ Issue PO
Qualification Based (non-A/E)	Over \$200,000	Qualifications based RFP
Qualification Based (A/E)	Over \$200,000	Qualifications based RFP
Task orders against UMB master contracts	Any	Task Order request as required by master contracts
Exempt Purchase	Above \$25,000	Reference PP&P section IV.B *Include exemption form in Procurement file.

* Competition not required

Confidential & Proprietary Information

Occasionally, during a procurement process, the Buyer may share confidential information with the end user to assist with evaluating bids and proposals, or for other contracting purposes.

Confidential information is to be handled in accordance with the following:

In general, disclosure of any information that has been requested to be held confidential is prohibited. In no circumstances may this information be disclosed except as provided by the Maryland Public Information Act (MPIA) or other applicable law.

Any vendor submitted document that contains confidential or proprietary information should be conspicuously stamped or marked as being confidential to serve as notice to anyone retrieving documents from the files. Any questions regarding confidential information should be referred to the AVP SSAS who should seek guidance from legal counsel as appropriate.

Public Posting of Solicitations and Awards

Solicitations greater than the simplified procurement threshold shall be published in eMaryland Marketplace Advantage (eMMA). In addition to the eMMA posting, buyers may choose to use additional methods such as those listed below if necessary. Any solicitation published in eMMA needs to have the contract award published at the conclusion of the procurement.

Contract Renewal Options

Per USM policy, a contract may include option(s) for renewal or extension. Solicitations and any resulting contracts must clearly state renewal terms. The option(s) may be at the Institution's sole discretion or by mutual agreement. It is preferable that renewals are at UMB's sole discretion. Any renewal terms that are not at sole discretion of UMB should be reviewed by the SSAS buyer's supervisor. Contract renewal values should be calculated cumulatively, in addition to the original base period for dollar range approval requirements.

Price Analysis

The purpose of price analysis is to ensure that a price for a contemplated purchase is fair and reasonable. Under certain circumstances, price analysis is required. The SSAS buyer will perform this analysis with assistance / information from the end user and vendor as necessary.

Facilities Impact Review

For those purchases which the buyer reasonably suspects that the installation or equipment being purchased will impact the footprint, function of the building, or require special hook up (IE 240v, water line/steam line) a facilities review shall be completed. Facilities should be contacted via email by the buyer with the quote and end user contact information. Purchase shall not be processed until facilities approval is rendered. Some examples of equipment requiring facilities review are sterilizers, lab freezers, and dental chairs.

IT Purchases

Requisitions for IT purchases require review through the IT Procurement Compliance and Security (IT-PCS) form. All qualifying IT purchases (hardware and software) require CITS Security and Compliance review prior to the purchase using the online automated form. An approved IT-PCS form must be included with all qualifying requisitions or included in the backup documentation for PCard purchases, respectively. PCard transactions will be monitored for compliance. Requisitions for IT purchases that do not

have an approved IT-PCS form will be returned to the department. Refer to [IT-PCS form page](#) on the SSAS website for more details.

[Purchasing Insurance](#)

All requests to purchase insurance should be forwarded to the Office of Risk Management for review and processing.

[Purchase of Alcoholic Beverages](#)

University policy generally prohibits the purchase of alcoholic beverages. Any requisitions for purchase of alcoholic beverages are to be brought to the attention of SSAS management.

SSAS management may approve the following exceptions:

1. Requisitions for alcohol for medical/research purposes only, with expressed signed backup letter with appropriate authorization.
2. Supply services (BIORESCO) requests for alcohol distribution compliant with #1 above, for school and laboratory distribution.

[Radiation Producing Devices & Radioactive Material](#)

The acquisition of radiation producing devices and radioactive materials must comply with the policy of [Radiation Safety Office](#). These purchases must include approval documentation.

[Sole Source Procurement](#)

Purchases of \$25,000 and above generally require competition; however, sole source purchases shall be permitted only when the SSAS buyer determines that there is only one source that will satisfy the requirements and/or circumstances present.

Requisitions requesting a sole source procurement must be accompanied by a Single/Sole Source Justification and Ethics Law Compliance Certification. SSAS is responsible for making the determination of the validity of a sole source.

[Supplier Diversity](#)

UMB is committed to the inclusion of small, minority-owned, woman-owned, and other diverse businesses in an organization's purchasing and contracting opportunities. Quantum users now have access to the supplier diversity application known as Sweeten. Individuals who procure goods or services for their departments should use the Sweeten Achieve directory to easily identify diverse suppliers who sell the goods and services that they need to buy.

The UMB Supplier Diversity Program Manager is charged with the oversight of UMBs participation in a variety of state supplier diversity programs including State Minority Business Enterprise (MBE) and Certified Small Business (CSB) programs, and Federal Small Business Subcontracting Plans (SBSP). For more information and assistance with these programs, please visit the [UMB Supplier Diversity](#) page.

Small Business Subcontracting Plan (SBSP)

Federal contracts (not grants) awarded UMB over a certain dollar threshold (currently \$900,000) must contain a small business subcontracting plan. In this plan, which follows the requirements of FAR 52.219-9, UMB sets goals for what it plans to subcontract to small businesses, small, disadvantaged businesses, women-owned small businesses, HUBZone small businesses, veteran-owned small businesses, and service-disabled veteran-owned small businesses. SSAS Contact: Sheneka Nichols, Subcontracting Specialist.

Maryland Correctional Enterprises (MCE)

Per the Maryland state law and the University System of Maryland Procurement Policies and Procedures, all furniture must be purchased from MCE unless a waiver is requested and granted by MCE. MCE waiver requests must be received by SSAS and subsequently submitted to MCE for approval before a furniture purchase from a non-MCE vendor can be made. Waivers may be sought when MCE does not provide the type of furniture, the deliverable timeline, or they cannot otherwise fulfill the order.

Use of Federal Funds

When using federal funds, there are additional policies and procedures that need to be followed. When SSAS sees a federal fund source in the requisition, they will add these additional steps into the process.

Contract Renewal Options

Whenever a contract renewal option is being exercised, the SSAS Buyer is required to inspect the original contract package and determine if any other documents require update or renewal.

Equipment Loan Program (ELP) Purchases (Formerly RELP)

The equipment loan program is a USM loan program for the purposes of assisting institutions with the purchase of property, either tangible or intangible, that is eligible to be capitalized as plant property or equipment.

The period of the loan can only be 3 or 5 years. All ELP loans must be pre-approved by USM. All ELP loan applications require signature of AVP, SSAS.

The ELP Process:

1. Submit a requisition through the Quantum Financial System. In Notes To Buyer, indicate that this is an ELP purchase, and provide the following information:
 - The SOAPF from which the loan payments will be made
 - Estimated Loan Amount
 - Repayment Term (3 or 5 years)
 - Expected Date of Loan
 - Equipment Description
 - Useful Life of Equipment (years)

In the Quantum requisition line, use the ELP clearing charge account below:

Source	Org.	Activity	Purpose	Function
205	00006203	000000	10021862	630

2. If sole source, the Sole Source Justification and Ethics Law Compliance Certification must be submitted with the requisition.
3. Services are not permitted under the program, and software is not permitted unless it is the operating system of the hardware. Installation and training, for example, will generally be acceptable if included in the overall equipment purchase price.
4. The solicitation and procurement will otherwise follow the same process as a non-ELP funded purchase. Upon receipt of the equipment, the department will receive in Quantum Financials. The vendor will send the invoice to Accounts Payable.
5. Accounts Payable will pay the invoice using the ELP clearing charge account that is on the PO. Once the vendor is paid, General Accounting will submit a copy of the invoice and proof of payment to USM to reimburse the clearing account and provide the department's project id to repay the loan. USM will reimburse the clearing account and provide an Amortization Schedule for the pay back of the loan.
6. Payback automatically occurs via R-Stars transfer. Principal and interest payments are deducted from the identified payback SOAPF semi-annually until the loan is satisfied.

Change Order

Periodically, a purchase order requires a change order after it is issued. The end-using department must submit a change order requisition through Quantum for processing. The SSAS buyer shall ensure that the change order does not increase the PO total above any competitive threshold without taking appropriate procurement action.

For a no-cost change order, the end-using department cannot submit a requisition through Quantum. In these cases, the end-using department should notify the SSAS buyer of the required change(s) (ex: extension of period performance). The SSAS buyer will edit the PO in Quantum to create the change order. The SSAS buyer should either attach the email correspondence requesting the change or thoroughly annotate in the notes section who requested the change and the reason for the change.

After-The-Fact (ATF)

An After-The-Fact (ATF) purchase occurs when a department obtains goods and/or services from a supplier before the issuance of a compliant Purchase Order (PO) by the SSAS buyer with requisite purchasing authority. An ATF purchase is non-compliant, violates UMB policy, and puts both UMB and the supplier at risk. The department must complete the [ATF form](#) to document the ATF purchase and request that SSAS issues a PO.

Ethics

UMB employees are expected to follow:

- The UMB Code of Ethics
<https://www.umaryland.edu/policies-and-procedures/library/financial-affairs/policies/viii-711a.php>
- The State of Maryland Public Ethics Law
<https://ethics.maryland.gov/public-ethics-law/>

Gratuities

UMB employees involved in procurement transactions may not accept gratuities from vendors.

Use of Tax Exemption Number

UMB direct purchases of goods are exempt from state of Maryland sales tax. Vendors and end users may obtain a copy of UMBs tax exempt cert from SSAS.

BOR Approval

Consistent with section VII.C.2 of the USM PP&P, prior approval must be received from the BOR for any procurement exceeding \$5 million.

BPW Approval

In accordance with USM PP&P, the following types of procurements must be presented to the BPW on an Action Agenda for BPW approval.

1. Capital improvement (A & E and Construction) contracts in excess of \$1,000,000 (Maintenance as defined by the PP&P does not trigger BPW approval).
2. Service contracts in excess of \$1,000,000 (inclusive of all renewals and options).
3. Modifications to capital improvement contracts and service contracts that exceed \$1,000,000.
4. Purchases using MCCBL or PAYGO funds regardless of dollar amount.