

Overview of Key Montclair State Procurement Policies Procurement Services

January 2026

An aerial photograph of the Montclair State University campus. The image shows several large, multi-story buildings with red-tiled roofs and white walls, interspersed with green lawns and trees. A tall radio tower is visible in the background on the left. The sky is clear and blue.

MONTCLAIR
STATE UNIVERSITY

Table of Contents

<u>Description</u>	<u>Pg.(s)</u>
• Background Information	3-7
• Key Procurement Thresholds	8-9
• Publicly Bid RFP	10-11
• Cooperatives	12
• Waiver of Advertising	13-14
• BOT Approval Thresholds	15-16
• Compliance Requirements	17
• Contract Review & Management	18-20
• Other Information	20-22

Procurement Services Mission

The Procurement Services Department strives to support the mission of Finance & Administration as well as the University by:

- Procuring goods and services in the most efficient and cost-effective manner, including strategically sourcing through all available means;
- Providing the highest quality of customer service to all the faculty and staff of the University;
- Ensuring that all purchases are in compliance with the University's purchasing guidelines and the State of New Jersey's laws and regulations; and
- Executing the bidding process in its entirety, including but not limited to creating purchase orders, processing change orders, and maintaining the supplier database.

Procurement Services Teams

The Procurement Services Department has team members who specialize in various tasks, which are outlined on the [Staff Information](#) website page:

- Strategic Sourcing: Manages publicly bid or invite-only solicitations, spend analysis, and large-contract supplier relationships. This team focuses on identifying and overseeing larger bidding processes, helping to ensure the bidding event clearly defines all tasks, services, and deliverables a contractor must perform. This team also reviews requisitions tied to sourcing events it oversaw.
- Procurement Operations (Buying Side): Manages all requisitions (except those mentioned above), delegated waivers of advertising and BOT resolutions, the Procurement Card (P-Card) program, the procurement contract review process, and other daily operations tied to procurement.
- Procurement Operations (Supplier Side): Manages the supplier database, including onboarding new suppliers, supplier updates, and proactive compliance monitoring.

Relevant Procurement System for Various Processes

Workday Strategic Sourcing (WSS)

- Sourcing Events (Bids) Managed by Procurement
 - Public Bids or Waiver of Advertisings
- Delegated Waiver of Advertising
 - Managed by the Department
- Contract Review Requests

Workday Procurement

- Requisition Process through Purchase Order, including any Change Orders
 - Non-Catalog Items or Punch-Outs
- Related Processes (Receipts, Invoices, Payment)
- Supplier Onboarding and Updates
- P-Card Approvals

**Training Resources on WSS and Workday Procurement are listed on the [Procurement Resources](#) page.*

Montclair State University Act

- Establishes bidding requirements.
- Defines when exceptions (“waivers”) can be made to public bidding.
- Requires establishment of a board-approved procurement policy.
- Permit procurements of goods and services, including construction, to be awarded based on the bid most advantageous to the University, “price and other factors” considered.
- Price may have varying importance depending on the type of goods or services.
- Other factors (or technical criteria) may include, but are not limited to, the specific qualifications of the bidder, including experience, staffing, ability to complete the scope of work, etc.
- When applicable, the evaluation committee scores the bidders based on the technical criteria.
- The ranking of the other factors can be used to select a bidder that did not provide the lowest price.

NJ State Controller's Best Practices

1. The pool of contractors solicited should be as **expansive** as possible;
2. Statements of work should be drafted in **clear and unambiguous** terms;
3. Proposals should be judged on the basis of predetermined, **merit-based evaluative criteria**, made known to suppliers before proposals are submitted;
4. The evaluative criteria should be judged by a **qualified evaluation committee**;
5. The evaluation process should be **explainable** to evaluators and competing suppliers, and capable of withstanding scrutiny under a protest challenge; and
6. The scoring process and award recommendations should be **well-documented** and retained.

Office of State Comptroller (OSC) - *“At a minimum, the use of these best practices, serving as a safeguard against fraud, collusion, bribery, and the like, will make it far more difficult for dishonest participants in the procurement process to achieve their unlawful goals. These practices are aimed at protecting the public by helping to ensure that government gets the best value for services it buys, and by safeguarding against unfair favoritism and inadvertent waste of taxpayer dollars.”*

Key Procurement Thresholds

Requirement*	General Goods & Services Contract Value	Public Works Contract Value
1 Quote (<i>Competition is not required, but is recommended</i>)	\$0 - \$23,959	\$0 - \$8,519
3 Quotes (<i>except for limited sole source exceptions in which the sole source form must be completed or use of a Cooperative Contract in accordance with the methodology listed on the website</i>)	\$23,960 - \$119,799	\$8,520 - \$42,599
Bid Threshold - Three Potential Methodologies 1) <u>Public Bid</u> ; 2) <u>Waiver of Advertising</u> (<i>if an exception exists</i>); or 3) <u>Use of a Cooperative Contract</u> (<i>in accordance with the methodology listed on the website</i>)	\$119,800 and above	\$42,600 and above
Board of Trustees Approval (<i>required for all procurements regardless of methodology</i>)	\$850,000 and above	
OSC Post-Award Notification (<i>within 20 days of award</i>)	\$3,000,000 - \$15,199,999	
OSC Pre-Advertisement and Post-Award Notification (<i>a minimum of 30 days prior to advertisement and within 20 days of award</i>)	\$15,200,000 and above	

*University Contracts (UNC's) may be utilized for any threshold. [University-wide UNC's](#) are posted on the website.

Public Works Projects (Requiring Prevailing Wage)

The NJ State Prevailing Wage Act applies to projects exceeding \$2,000 on property owned by Montclair (or in leased buildings when Montclair uses at least 55% of the building space and that exceed 20,000 square feet) that meet one of the following definitions. When applicable, the public works procurement thresholds apply, and certified payroll documentation is required with each invoice:

- Construction, reconstruction, demolition, alteration, or
- Custom fabrication, e.g. the fabrication of:
 - plumbing, heating, cooling, ventilation or exhaust duct systems, mechanical insulation, or
 - one or more signs in a project that cost a total of more than \$30,000 and are part of a project or
 - any other fabrication which is either of components or structures pre-fabricated to specifications for a particular project of public work or of other materials finished into components without further modification for use in a project of public work or for use in a type or classification of a project of public work.
- Repair work, or
- Maintenance work, e.g.
 - Painting or decorating or
 - Repairs of existing facilities when the size, type or extent of such facilities is not changed or increased, or
 - Maintenance work that exceeds the scope of work and capabilities of in-house maintenance personnel, requires the solicitation of bids, and has an aggregate value exceeding \$50,000.

**Spend Categories where public works may apply have a soft alert in Workday to notify end users that the lower procurement thresholds may apply.*

Publicly Bid Request for Proposal (RFP)

If the potential purchase price for a good or service exceeds \$119,800 (or \$46,200 for a public works project), a Publicly Bid Request for Proposal (RFP) may be required for the procurement. RFPs are initiated in WSS by selecting the appropriate Sourcing Request and providing the requested information. In addition, drafts of the following are required, all of which will be reviewed and honed in collaboration with the requesting school/department: RFPS

- A full description of the Scope of Work and Statement of Qualifications that are being sought
- Technical Evaluation criteria (quantitative and qualitative factors, other than price, upon which submissions will be judged)
- Pricing Sheet
- Bid evaluation committee members (if applicable)
- Relevant dates (expected RFP issue date and due date based on when product or service is needed. Procurement will advise on the feasibility of the timeline and appropriate dates for questions, etc.)

Note: Publicly bid RFPs and the process that follows issuance are always managed by Procurement Services, in collaboration with the requesting school/department.

Publicly Bid RFP (continued)

Procurement Services will work proactively with the school/department to develop the RFP document, and will manage the process from release of the public bid to receipt of bids and contract award which may include:

- Advertisement: The University will post the RFP on its website for all parties to review and respond
- Conference/Site Visit: A Pre-Proposal Conference or Site Visit can be scheduled for the project if required or requested.
- Question & Answers: The University accepts questions regarding the RFP until a certain date and time. The University will work with the end users to determine answers to the questions received and will post the addendum with answers to all the questions addressing the project. This process helps to improve the RFP that was originally posted.
- Bid Opening: The date on which submissions must be received.
- Procurement Review: Procurement will review the proposals for mandatory submission documentation and release responsive proposals to the Evaluation Committee.
- Evaluation: For most RFPs, the Committee will review each proposal and fill out a score sheet for each bidder based upon the bidder's proposal. This evaluation is based on price and other factors (technical evaluation).
- Notice of Intent to Award: Once the Committee reviews and recommends a bidder for award, a Notice of Intent to Award will be sent to all bidders. Procurement will request any additional forms as needed.
- Contract: After the protest period, the contract will be prepared by Procurement. All contracts shall be submitted to University Counsel for review as required.

Typically, the timeline for a public bid from the issuance date to award is about 45 days; BOT approval is required for RFPs over \$850,000

Cooperative Contracts

Cooperative contracts can be beneficial as the competitive process has already taken place. There are four (4) different types of cooperative contracts that are approved for use: 1) State of New Jersey Cooperative Contracts; 2) Federal GSA Cooperative Contracts; 3) Local Cooperative Contracts; and 4) National Recognized Cooperative Contracts (lead public agency).

Some Key Benefits of Cooperative Contracts include:

1. Public Bidding Not Required: Cooperative purchases eliminate the need for public bidding above the bid threshold.
2. Competition Not Required Below \$119,800: The University may rely on a cooperative contract to eliminate the need to obtain competition for purchases below the general goods and services bid threshold (*unless required per the contract*)
3. Less Complex Process at or above \$119,800: Purchases at or above the general goods and services bid threshold require a minimum of one (1) additional proposal or quote from a different supplier to document that the purchase is most advantageous to the University, considering cost and other factors.
 1. *This is not required for State of New Jersey Cooperative Contracts (unless required per the contract).*
 2. *In the rare instance that additional competition cannot be obtained, the [Sole Source Form](#) must be provided.*
 3. *Procurement Services reserves the right to require a formal bidding process.*

Please refer to our Procurement website's [Cooperative Contract](#) page for more information and threshold information.

**Cooperative purchases, even those above \$119,800, can be “delegated” to the using department, although Procurement can assist with more complex projects.*

Waiver of Advertising (Does not require a Public Bid)

- A method to procure a good or service with a dollar value greater than \$119,800 (or \$46,200 for public works projects), without issuing a publicly bid RFP.
- Must meet one of the statutory waivers to public bidding.
 - Refer to the Authorized Exemptions to Public Bidding on the [Waivers of Advertising](#) page.
 - Examples: Professional Services (those that require a license, such as attorneys and architects); Information Technology (software/hardware); Library Materials; or a Sole Source supplier.
- A Waiver of Advertising means that the RFP does not have to be publicly bid. This does not eliminate the requirement to bid competitively.
- Waivers of Advertising (WOA) can be “delegated” to the using department, although Procurement can assist with more complex WOA.
- Purchases under \$850,000 can be submitted on a rolling basis, while those over \$850,000 need to be approved by the Board of Trustees.

Waiver of Advertising (issued by Procurement Services or Delegated)

1. Waiver of Advertising RFP/Q issued by Procurement Services:

- Process is often very similar to a public RFP, and typically, the timeline from issuance date to award is about 45 days; review of Scope of Work/Specifications with the requesting school/department may require additional time. The process starts in Workday Strategic Sourcing by selecting the appropriate “Sourcing Request”.
- Procurement Services will collect all forms and requirements through this process.

2. Waiver of Advertising RFP/Q issued by internal customers:

- The department completes the procurement cycle in this instance.
- Collection of all forms and requirements are delegated when completed by the internal customer, but Procurement Services is available to assist in securing these documents as needed. The process starts in Workday Strategic Sourcing by selecting the appropriate “Delegated Waiver / BOT Request”.
- This includes providing the Scope of Work/Specifications for the Waiver of Advertising, proposals obtained through the competitive process, a summary of the procurement process, a rationale for the selected supplier, and contract documents (if applicable).

Board of Trustees (BOT) Approval Thresholds

Requirement	General Goods & Services Contract Value	Public Works Contract Value
Purchases pursuant to a Waiver of Advertising are delegated for approval to the Vice President for Finance & Treasurer and reported at the next BOT Meeting *Additional approvals may be required per the form (IT approval for SaaS, etc.)	\$119,800 - \$199,999	\$39,400 - \$199,999
Purchases pursuant to a Waiver of Advertising are delegated to the Chief Operating Officer and reported at the next BOT Meeting *All purchases over \$200,000 require Budget Office approval and Academic Affairs purchases require University Provost approval	\$200,000 - \$499,999	
Purchases pursuant to a Waiver of Advertising are delegated to the University President and reported at the next BOT Meeting	\$500,000 - \$849,999	
Purchases must be submitted to the Board of Trustees for approval *This applies to all purchases (regardless if the purchase is through a Waiver of Advertising, Publicly Bid RFP, or a Cooperative Contract) <u>*It is expected that the full and complete package be submitted to the Chief of Staff through Procurement Services approximately four (4) weeks before the BOT meeting</u> <i>(submission deadlines are listed on the Waiver of Advertising page)</i>	\$850,000 and above	

Board of Trustees (BOT) Additional Notes

- The effective date of a contract cannot be before the date the Board of Trustees adopts a resolution approving the contractor or, when appropriate, the VP for Finance and Treasurer, COO, or President approves the waiver documents. Contractors are not permitted to perform work prior to contract execution.
- The Board of Trustees (BOT) meeting dates can be found on the BOT website's [Waiver of Advertising](#) page.
- Following all required approvals, Procurement Services issues a Resolution number for each approved contract to identify the procurement methodology.
- Approval thresholds are for the aggregate amount (includes prior BOT approval if a contract increase is needed or previous spending if the same contract is being increased).

New Jersey Compliance Requirements

(Montclair cannot process procurements without these)

Requirement*,***	General Goods & Services Threshold	Public Works Threshold
Business Registration Certificate (BRC)* * <i>(for individual or cumulative purchases within a fiscal year or the aggregate contract value totaling 15% of bid threshold or more) – <u>Non-profits and public entities are exempt.</u></i>	\$17,970	\$6,390
Chapter 51 Approval (EEO333 Political Contributions)** <i>(for individual or cumulative purchases within a fiscal year or the aggregate contract value totaling \$17,500 or more) – <u>Non-profits and public entities are exempt.</u></i>	\$17,500	
Certificate of Employee Information Report (Affirmative Action)** <i>(for individual or cumulative purchases within a fiscal year or the aggregate contract value totaling the bid threshold or more)</i>	\$119,800	\$42,600
Public Works Registration Certificate** <i>(related to public works/prevaling wage)</i>	Not Applicable	\$2,000

- *Additional information on these requirements can be found on the [Procurement Resources](#) page.
- **The supplier file can be accessed in Workday to check if these requirements are on file.
- ***For new suppliers, a W-9 for U.S. entities or a W-8 Form for Foreign Entities, as well as a [Supplier Create Form](#) is required. Additional information on this process can be found on the [Supplier Onboarding & Maintenance](#) page.

Contract Review (including University Counsel)

- Regardless of contract value, if a supplier is proposing its own T&Cs or changes to our T&C's, then University Counsel (legal) needs to review and approve prior to signature by the proper signatory authority.
- In these cases, the end user must submit a “Procurement Contract Request” in WSS.
 - The request must include the contract in question, a signed or redlined version of the Montclair State University Standard Terms and Conditions (ST&C) in most instances, and relevant backup documentation (i.e., 3 quotes if it is in the quoting threshold range)
 - **All suppliers should be strongly encouraged to accept the University's Purchase Order as the contract instead of going through the CAS process when possible.**
- Procurement Services reviews to ensure that the Using Department adheres to the Procurement Policies & Procedures. Once confirmed, Procurement Services will initiate the approval workflow in WSS, which may include routing the contract to University Counsel (legal) for review.
 - University Counsel (legal) will redline the contract where necessary and send back the supplier within WSS.
 - Depending on the complexity of the contract, there may be many rounds of revisions.
- Following all contract approvals, Procurement Services will oversee the contract execution process.

Contract Signing Authority

As it relates to contracts involving the procurement of goods and services that require signature by the University, the signing authority levels are as follows:

Amount	Approver Position / Title
\$0 to <\$200,000	Vice President for Finance and Treasurer (VPFT)
\$200,000 to <\$500,000	Chief Operating Officer and Senior Vice President (COO);
\$500,000 to <\$850,000	President
≥\$850,000	President (after Board of Trustees approval)

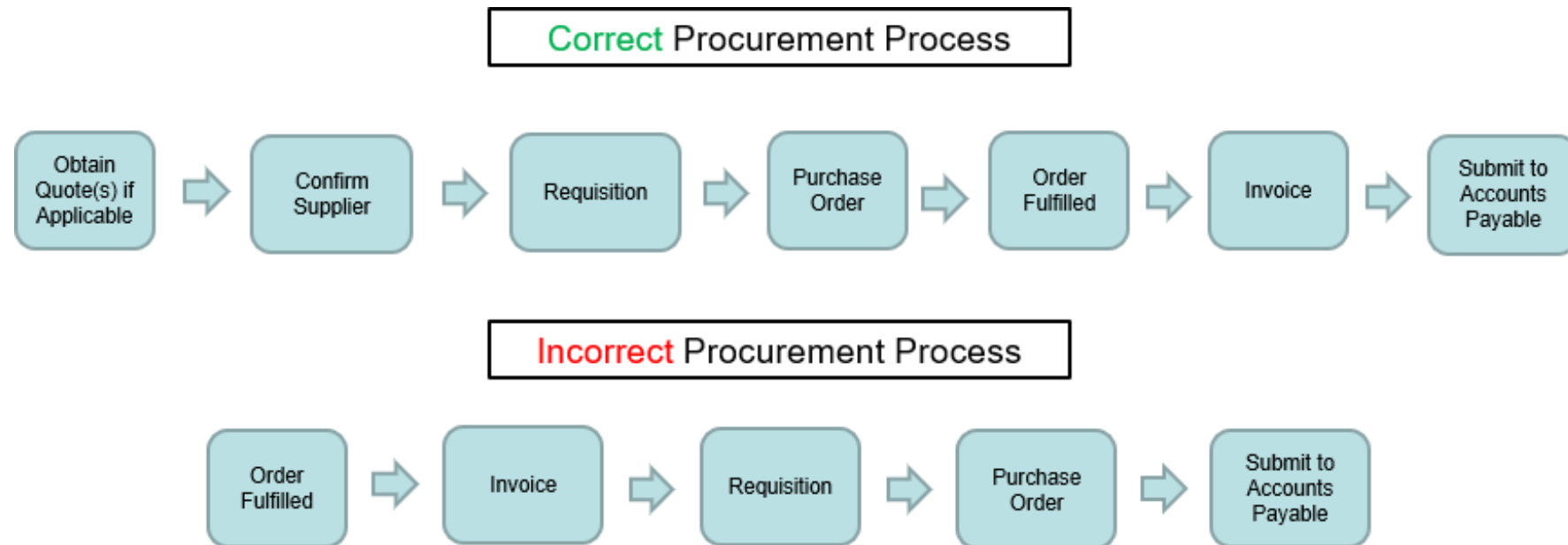
- The VPFT, COO, and the President are the only signatory authorities for the University for goods and services contracts except in cases where the approval has been delegated in writing.
 - **No other individuals have the authority to enter into a goods and services contract on behalf of the University.**
- The VPFT or COO may sign larger value amendments at their discretion if no additional funds above Board approval are contemplated.

Contract Administration

- Once a contract is executed (or a Purchase Order is issued when there is no formal contract), the using department takes responsibility for managing the relationship with the awarded contractor. This includes ensuring all terms and conditions are met, including but not limited to :
 - Timeliness;
 - Quantity;
 - Quality of deliverables/services;
 - Billing is consistent with agreed-upon amounts and frequency, etc.
- All contract discrepancies should be communicated in writing to the contractor and maintained in a file.
- All amendments/changes to the contract must be made through an official amendment document (or a Change Order to the Purchase Order if there is no contract).
- Procurement Services should be contacted if identified problems are not promptly cured after bringing them to the supplier's attention.

Requisitions & Procure-to-Pay Cycle

- Requisitions must be submitted to Procurement Services and converted to purchase orders PRIOR to the supplier performing any work. Must state a clear description of the goods and services, include all relevant information including any contract #'s, quote #'s, contract term, etc., and attach backup documentation (written quotes, contract, etc.).
- Individual faculty and staff members are not authorized to procure any goods or services on behalf of the University: Ensuring purchase orders are provided prior to the supplier performing any work allows the University's Terms & Conditions to be connected to the purchase and allows for review to ensure compliance with University policy and appropriate State laws, regulations, policies, and procedures.



Risks of Noncompliance with Applicable Laws and Policies

- Audits by New Jersey are performed, penalties can be assessed
- Violations of the governing law, our own Board's procedures, and our Procurement Policy can have serious repercussions for individuals and for the institution.
- Protests by suppliers claiming non-compliance with procedures, differential information provided to suppliers, unfair evaluation, etc. can lead to – *has led to* – expensive and time-consuming litigation or threats of litigation.
- Performance accountability issues with suppliers where the RFP, which serves as the basis for the contract, is unclear about deliverables and standards.
- Adverse publicity with regard to controversial procurements, particularly if acquired without following established procedures.

Detailed Procurement Processes & Trainings

- **Strategic Sourcing:**
 - **Bidding Processes:** The Strategic Sourcing Team provides a training outlines the bidding process and how to craft a Scope of Work that will help lead to an effective project.
- **Procurement Operations:** The Procurement Operation provides various trainings:
 - **Supplier Onboarding & Updates:** Outlines processes related to updating supplier files. Refer to the [Supplier Onboarding & Maintenance](#) and [Supplier Information](#) pages.
 - **P-Card Program:** Outlines the P-Card program (University credit card) intended to simplify and streamline the acquisition of small-value goods and services and outlines those processes. Refer to the [P-Card Program](#) page.
 - **Procurement Contracts:** Outlines the procurement contract review process in detail.
 - **Waiver of Advertising (Delegated):** Outlines the self-managed waiver process.
- **Procure-To-Pay Training Guides:**
 - **Workday Procurement Lifecycle:** Provides details about the entire requisition process, including information about the relevant budget processes and the payment processes handled by the Accounts Payable Department.
 - **Workday Strategic Sourcing (WSS):** Provides details about the University's electronic platform for procurement contract management, bidding events, and other procurement-related requests.
- *These trainings are offered on a recurring basis and can be signed up for within the [ITDS Training Portal](#). The training materials are located on the [Procurement Resources](#) page.*

Questions?