



# Procurement Services & HUB Program

Texas A&M University – San Antonio



## Objectives:

- Understand why procurement rules exist
- Learn how the procurement process works
- Recognize the different *procurement processes* used
- Understand the different *procurement instruments*
- Know *when and how to engage Procurement*

# Agenda



TEXAS A&M  
UNIVERSITY®

## **Procurement Services**

- Procurement Foundations & Compliance
- Procurement Processes
  - Competitive Solicitations
  - Sole Source, Existing Contract, Exempt Purchases
- Procurement Instruments
  - Requisitions
  - Purchase Orders
  - Formal Contracts
  - Sourcing Events
  - Group Purchasing Agreements

## **HUB Program**

- Review of 2025 TAMUSA HUB Reports



# Procurement Foundations & Compliance

# Why Higher-Education Institutions Use Texas Procurement Rules:



## 1. *Stewardship of Public Funds*

- Institutions use taxpayer and state-appropriated money
- Rules ensure competitive purchasing and prevent waste

## 2. *Transparency & Public Trust*

- Standardized procedures
- Publicly posted solicitations
- Clear documentation for audits and oversight

## 3. *Fair & Open Competition*

- Vendors compete on equal footing
- Encourages best value
- Supports Historically Underutilized Businesses (HUBs)

## 4. *Legal Compliance*

- Required by Texas Government Code, Education Code, and Comptroller rules
- Ensures institutions pass state audits and avoid penalties

## 5. *Efficiency & Standardization*

- Common processes across institutions and state agencies
- Reduces administrative burden
- Enables cooperative purchasing and shared contracts

# Texas Procurement Rules

Texas public higher-education institutions adopt state procurement rules because they are required to by state law and statute.

Together, these laws and regulations ensure fairness, transparency, competition, and fiscal responsibility in all purchasing.



- Texas Government Code (Ch. 2155–2157, 2161, 2261–2262)
- Texas Education Code (§51.9335–51.9337)
- Texas Administrative Code (34 TAC Chapter 20)
- Comptroller Procurement Guide (mandatory implementation)
- Oversight bodies (SAO, LBB, DIR)

# Rules and Regulations

Texas A&M University departments have delegated authority to make purchases of equipment, supplies, and services within specified dollar limits (including freight and/or postage), regardless of the funding source. This limited authority is delegated to allow departments to expedite the purchase of items needed immediately without having to prepare a purchase requisition. The dollar limit is currently restricted to not exceed \$25,000.00. Purchases may not be separated in order to remain within the delegated dollar limit.

Departments are encouraged to purchase equipment supplies and services from Historically Underutilized Businesses (HUBs). An online [HUB Directory](#) is available to assist you in identifying HUBs.

For purchases exceeding the delegated departmental spending limits, requisitions, bids and purchase orders processed through the Department of Procurement Services are usually required. The following guidelines apply:

Type of Order	Type of Funds	Requisitioning Procedures
Non-Emergency Purchases, Goods and Services	All Funds (\$25,000.01 or more)	Create a requisition in AggieBuy and attach specifications. AggieBuy will automatically route the requisition to Procurement Services.
Emergency Purchases, Goods and Services	All Funds (\$25,000.01 or more)	When possible, contact Procurement Services for prior approval. Enter an AggieBuy Purchase Requisition and include a completed <a href="#">Justification of Emergency Purchases</a> form. See additional information below.

## Notes:

- Freight costs must be included in all dollar limits listed above.
- Large purchases may not be divided into small lot purchases in order to meet the specified dollar limits. (University Rule 25.07.03.M0.01 Section 2.1.3)

Departments are advised to carefully evaluate and plan their goods and services requirements on a monthly/yearly basis whenever possible.

## Delegated Purchasing Authority

- Texas A&M has delegated purchasing authority of up to \$25,000 to departments
- Purchases under the delegated purchasing authority don't require Procurement Services' review
- \$25,000 is based on the Total Contract Value (TCV)

*Total Contract Value (TCV):*

*The sum of the annual spend each year of the contract*



1

**\$25,000 or Less**

2

**Based on TCV**

3

**No Splitting Orders**

4

**Multi-Year Contracts**

5

**Bids not Required**



# Non-Compliant Purchases

A Non-Compliant Purchase occurs when an individual purchases a product or service, exceeding the delegated purchasing authority (\$25K) without going through the proper procurement process.

- After-the-fact purchase
  - Submitting a requisition for goods/ services that have already been ordered (verbally, via email, signing an agreement, etc.)
- Exceeds delegated purchasing authority
- Split purchases that cumulatively exceed \$25,000
- Consequences – loss of departmental or individual purchasing privileges, prompt pay charges, personally responsible financially, increased risk to the university.



# Procurement Processes



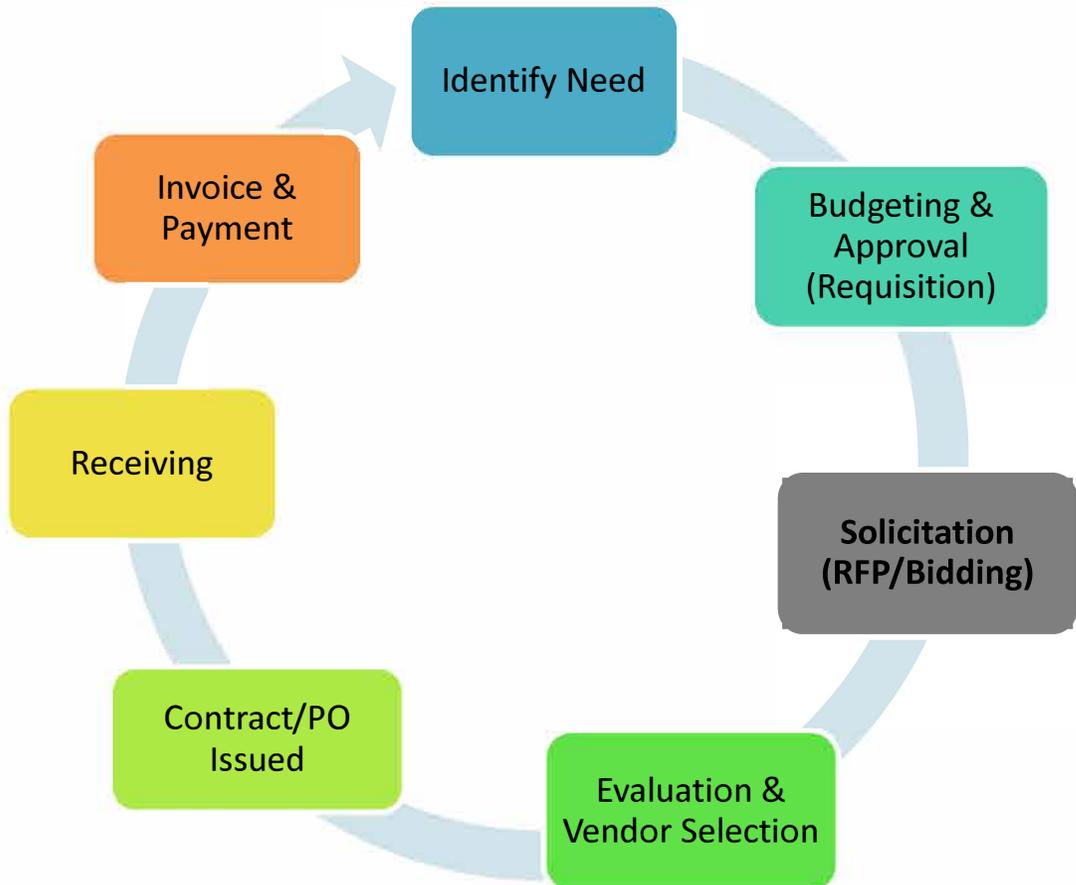
# **Texas Government Code**

## **§ 2155.063:**

*“Except as otherwise provided by this subtitle, a purchase of or contract for goods or services shall, whenever possible, be accomplished through competitive bidding.”*

<https://statutes.capitol.texas.gov/Docs/GV/htm/GV.2155.htm#2155.063>

# Procurement Cycle



**The Procurement Cycle** will always default to needing a competitive solicitation unless an alternative procurement method applies.

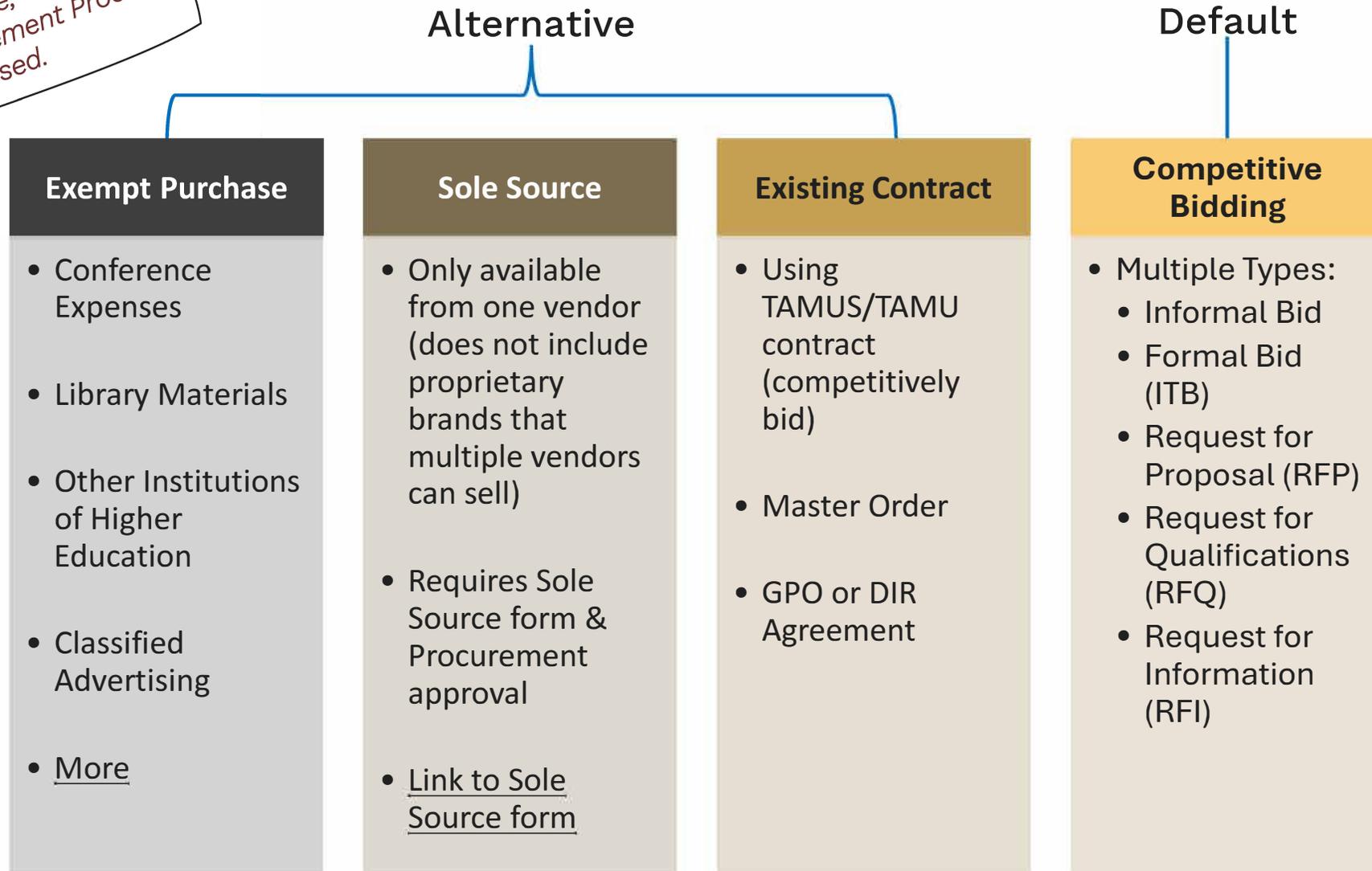
Alternative Procurement Processes may include:





# Approved Procurement Processes

The default Procurement Process is competitive bidding. If bidding is not possible, an alternative Procurement Process must be used.



# Approved Procurement Processes Cont.

- Purchases over \$25k require an approved Procurement Process
- Based on Total Contract Value (TCV)
- Exempt purchases – pre-approved to not require competitive bidding
- Sole source – competitive bidding is not possible
- Existing Contract – Group Purchases and contracts where competitive bidding has already been satisfied

*The default Procurement Process is competitive bidding. If bidding is not possible, an alternative Procurement Process must be used.*



Exempt Purchase	Sole Source	Existing Contract
<ul style="list-style-type: none"> <li>• Conference Expenses</li> <li>• Library Materials</li> <li>• Other Institutions of Higher Education</li> <li>• Classified Advertising</li> <li>• <u>More</u></li> </ul>	<ul style="list-style-type: none"> <li>• Only available from one vendor (does not include proprietary brands that multiple vendors can sell)</li> <li>• Requires Sole Source form &amp; Procurement approval</li> <li>• <u>Link to Sole Source form</u></li> </ul>	<ul style="list-style-type: none"> <li>• Using TAMUS/TAMU contract (competitively bid)</li> <li>• Master Order</li> <li>• GPO or DIR</li> </ul>

# Procurement Processes

## Thresholds and Timeframes



	Alternative			Default		
	Exempt Purchase	Sole Source	TAMU/S Agreement; GPO/DIR	Informal Bid	Formal Solicitation ITB	Formal Solicitation RFP/RFQ
<b>Amount</b>	Over \$25,000	Over \$25,000	Over \$25,000	\$25,000 - \$50,000	Over \$50,000	Over \$50,000
<b>Notes</b>	Must clearly fall within one of the published exempt purchase categories as listed on the Procurement Services website	Must include a completed Sole Source form signed and dated by the subject matter expert  Requires Procurement review and approval	Must include documentation, including reference to the contract on the vendor quote/proposal.  **Must be a competitively bid agreement**	Requires a minimum of 3 like bids  Bids should be solicited from a minimum of 2 HUB vendors  Low bid wins	Managed by Procurement.  Minimum posting time: 2 Weeks if under \$100k 3 Weeks if over \$100k  Department must provide a SOW and project details	Managed by Procurement.  Variable process; Typical posting time is a minimum of 4 weeks.  Department must provide a SOW and project details
<b>Est. Time to Complete</b>	0-4 days*	0-4 days*	0-4 days*	2-10 days	3-6 weeks	1-6 months

*\*If over \$100k, a HUB Subcontracting plan may be required. If required, this could add 9 days to the estimated time to complete.*

*Processing times listed assume that the department has provided all necessary documentation and that all documentation is complete and accurate, as well as aligned appropriately with the intended Procurement Process.*

# Procurement Considerations

Procurement must review many items for every purchase, regardless of the Procurement Process utilized.

- HUB Subcontracting Requirements
- Insurance Requirements
- Signature Requirements
- Certificate of Interested Parties (1295)
- Shipping & Payment Terms
- Delivery Terms
- IT Security/IT Accessibility
- Tariffs





# Procurement Instruments





# Requisitions



## Requisitions Cont.

- A requisition is the official request to make a purchase, not to pay a bill
- It must be created before goods or services are ordered or received
- Routes automatically through AggieBuy for all necessary approvals before funds are committed

### Correct Use:

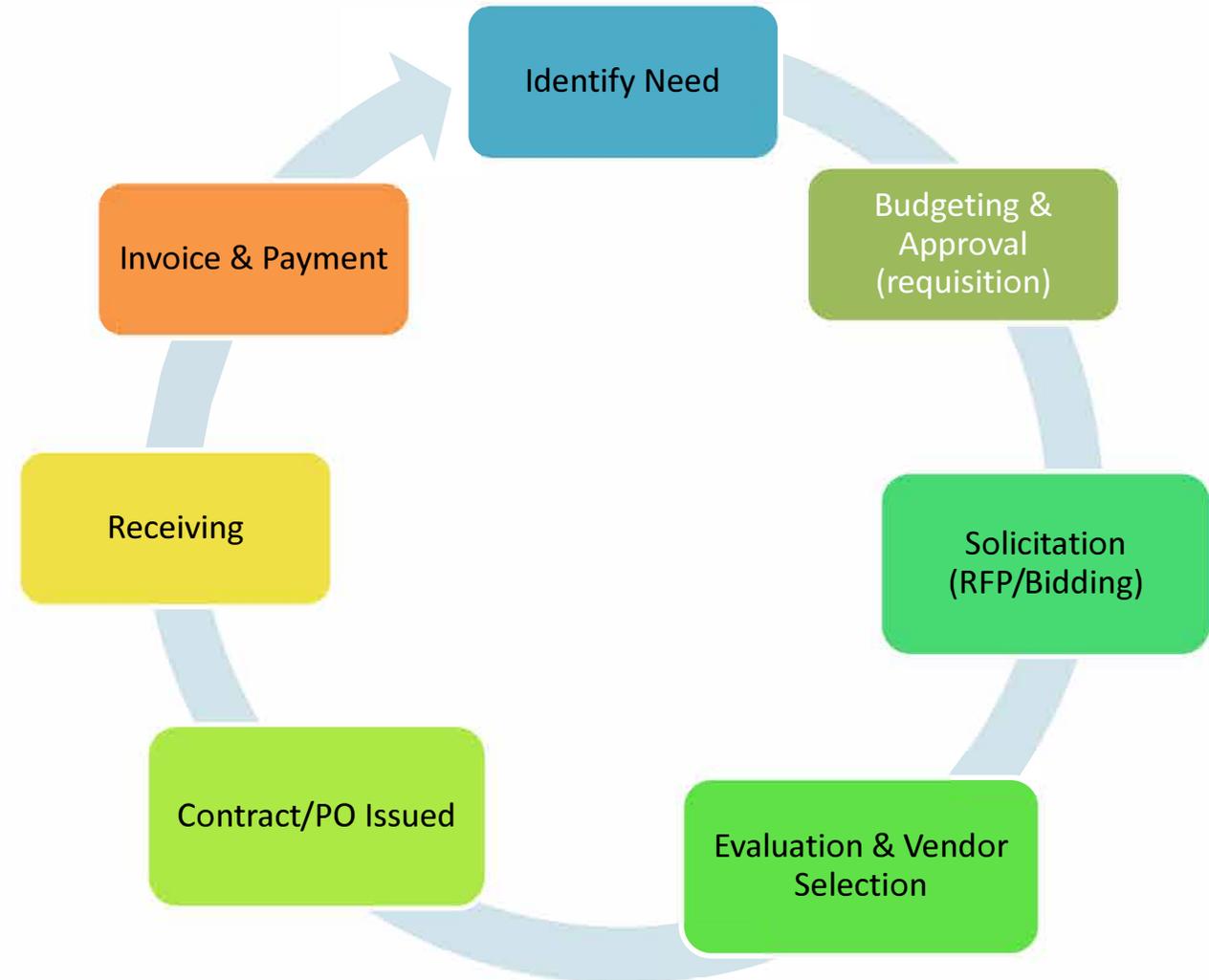
- Submitting a requisition once you've identified a need and obtained quote/proposal

### Incorrect Use:

- Submitting a requisition after receiving an invoice or delivery (this would be a non-compliant purchase)

## Requisitions pg. 2

- Ensures approvals, creates an encumbrance, and establishes an audit trail
- Prevents after-the-fact purchases and delays in payment
- Protects departments and the university



*A requisition is a **request** to purchase – **not** a payment mechanism*

- Ensure your requisition provides all project attachments, including but not limited to:
  - Vendor quotes/proposals
  - Internal emails
  - Vendor contracts, un-signed
  - Existing formal contracts
  - Project drawings
  - Complete Scope of Work that details requirements and deliverables.
  - Timeline of project; if a rush tell us and why.
  - Any/all documents that will assist Procurement Services in the processing of your purchase requisition.
- Total Contract Value (TCV) must be the entire budget for the project.
- Provide point of contact information for vendor(s) involved with purchase.
- Instructions on submitting an AggieBuy requisition: [shopping-creating-non-catalog-order.pdf](#)



## Requesting a Purchase:

### Best Practices and Reminders:

#### **DO:**

- Plan early and allow lead time
- Submit requisitions before ordering
- Provide complete documentation
- Communicate within AggieBuy
- Provide detailed line item descriptions
- Itemize all items
- Communicate intent clearly in the comments section

#### **Don't:**

- Split orders
- Submit requisitions after invoices
- Sign contracts without authority
- Skip Procurement review for \$25k+
- Submit old/expired quotes

# What is wrong with this requisition line item?

Line	Status	Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price	
1		<div style="border: 2px solid red; padding: 5px;">Instrument Health Check, Repair, Windows 10, PM Servicesservicebilling@biocare.net.Health Check \$18,921.00; Repair \$9,314.00; Window10 \$9,881.00; PM \$9,042.00. Total: \$47,158.00</div>	BCIP01-0027	EA	47,158.00	1EA 	47,158.00	... <input type="checkbox"/>

## ITEM DETAILS

Manufacturer Name: Biocare Medical LLC

Contract: no value

Internal Note: quote 10282025

Manufacturer Part Number: BCIP01-0027

Commodity Code: 99900288 / Maintenance and Repair of Equipment | 5512

Internal Attachments

Remember to itemize line items

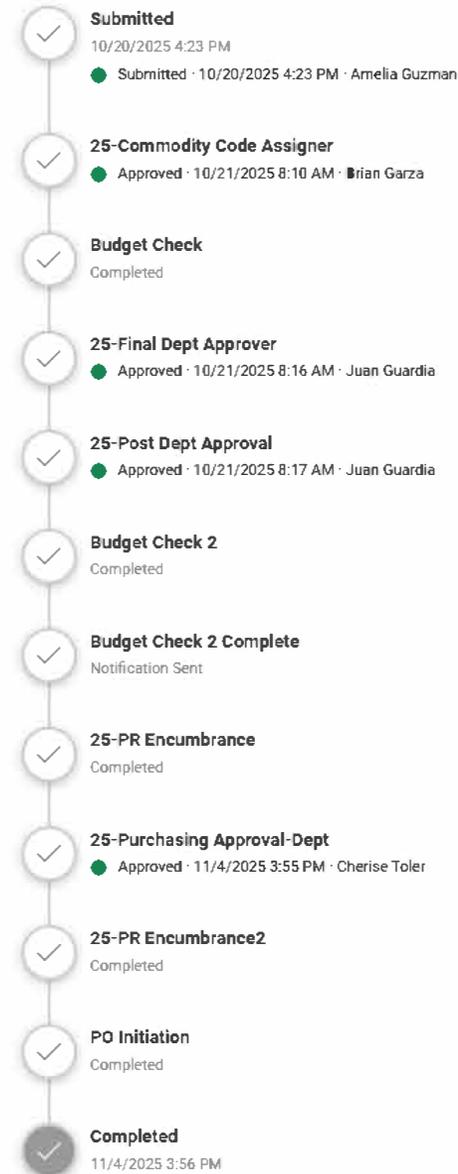
# AggieBuy Workflows

- “What’s Next” feature allows you to track previous, upcoming, and current approval steps
- Tells you who the requisition/PO is currently pending with
- Varies based on dollar value, commodity, department, etc.

## Requisition Workflow

What's next?

Workflow





Summary Taxes/S&H PO Preview Comments Attachments History

### General

Status: Pending  
Buyer Final

Submitted: 11/11/2025 3:24 PM

Business Unit: 02-Texas A&M University (02)

Ordering Department: 02-FNOP (02-FNOP)

Cart Name: AV Wall for MSC 2400s

Share cart: No user groups available

Prepared by: Amy Lilley

Prepared for: Amy Lilley

Cart Description/Purpose: no value

Software and/or Cloud Services (attach IT Review Form): ✗

Order Category: 1 - Regular

Report Reference A: no value

Report Reference B: no value

### Routing Info

Route to Procurement Services: ✗

Route to Contract Administration: ✗

### Shipping

Ship To

Attn Stephen Senkel  
University Center & Special Events  
MSC  
Room MSC LOADING DOCK  
275 Joe Routt Blvd  
1232 TAMU  
College Station, TX 77843  
United States

### Delivery Options

Ship Via: Best Carrier-Best Way

Requested Delivery Date: no value

Pre-Pay & Add: ✗

### Procurement Services

Buyer	Buyer Email	Buyer Phone Number
no value	no value	no value

Emergency (attach justification): ✗

Sole Source (attach justification): ✗

HSP-PAR Required: ✗

Contract Number: no value

Start Date: no value

End Date: no value

### Billing

Bill To

Texas A&M University-Accounts Payable  
\*\*\*Do Not Mail Invoices\*\*\*  
Email invoices to invoices@tamu.edu  
750 Agronomy Rd Suite 3101  
6000 TAMU  
College Station, TX 77843-6000  
United States

### Accounting Info

Do Not Encumber: ✗

Rush the Pymt Process: ✗

Special Payment Method: no value

Cost Receipt Required: ✗

IFR (Item for Resale): ✗

Trade-In: ✗

Create Asset Manually: ✗

Add to Asset Number: no value

### Report Codes-1

Order Type	USAS One	USAS Two	LDT Code
no value	no value	no value	no value

### Report Codes-2

Contract: ✗

### Summary

and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal	316,679.83
Shipping	0.00
Handling	0.00
<b>Total</b>	<b>316,679.83</b>

What's next?

Workflow

Show skipped steps

- ✔ **Submitted**  
11/11/2025 3:24 PM  
Submitted 11/11/2025 3:24 PM by Amy Lilley
- ✔ **Commodity Code Assigner**  
Approved - 11/11/2025 8:32 AM by Tyler Young
- ✔ **Budget Check**  
Completed
- ✔ **Final Dept Approver**  
Approved - 11/12/2025 7:39 AM by Billy Bielamowicz
- ✔ **Budget Check 2**  
Completed
- ✔ **Budget Check 2 Complete**  
Notification Sent
- ⬇ **Buyer Final**  
Pending - Unassigned
- ⬇ **PO Initiation**  
Future

# Communicating with Procurement

- Use the Comments section of the requisition
  - Ask or answer questions
  - Approve recommendations
  - Clarify details
- Ensures transparency and documentation
- Audit trail visibility

TEXAS A&M UNIVERSITY

Alle Search (Alt+Q) 79.99 USD

Requisition • 205449662

Summary Taxes/S&H **Comments 18** Attachments 7 History

**Brian Garza** - 9/10/2025 9:27:39 AM Requisition - 205449662 Comment Added ↻

CON-1762 created.  
Email sent: Cherise Toler <CTOLER@TAMU.EDU>, Cynthia Gillar <CGILLAR@TAMUSA.EDU>, Fritz Andrews <FANDREWS@TAMUSA.EDU>, Rebecca Cella <RCELLA@TAMU.EDU>

**Rebecca Cella** - 9/9/2025 11:40:11 AM Requisition - 205449662 Comment Added ↻

Sole Source approved by Cherise Toler 09/08/2025.  
IT-1S email attached in Internal Attachments.  
HSP waiver approved 09/08/2025. This is approved to route to Contracts.  
Email sent: Brian Garza <BGARZA3@TAMUSA.EDU>, Fritz Andrews <FANDREWS@TAMUSA.EDU>, Travis White <TWHITE1@TAMUSA.EDU>, Deborah Campos-Leon <DLEON@TAMUSA.EDU>, Jessica Nino <JMNINO@TAMUSA.EDU>

**Cynthia Gillar** - 9/9/2025 8:39:43 AM Requisition - 205449662 Comment Added ↻

I approve this HSP Waiver.  
Email sent: Cherise Toler <CTOLER@TAMU.EDU>, Rebecca Cella <RCELLA@TAMU.EDU>

**Cherise Toler** - 9/8/2025 4:45:16 PM Requisition - 205449662 Comment Added ↻

HSP waiver is approved, pending additional approval from Cindy Gillar.  
Email sent: Rebecca Cella <RCELLA@TAMU.EDU>, Cynthia Gillar <CGILLAR@TAMUSA.EDU>

**Rebecca Cella** - 9/8/2025 4:39:54 PM Requisition - 205449662 Comment Added ↻

HUB Subcontracting Plan HUB Waiver Request - Approval Required  
Per the steps outlined in Texas Administrative Code 20.285(a), Texas A&M University has determined that HUB subcontracting opportunities are not probable under the contract, therefore, a HUB Subcontracting Plan is not required. The reason(s) for this determination are justified below and will be documented in the purchase order file by the respective buyer.  
Justification - Axon Enterprise's products/services regarding this purchase are all-encompassing products/services; therefore, no subcontracting opportunities are available. All aspects of implementation will be handled by Axon Enterprise.  
Email sent: Cherise Toler <CTOLER@TAMU.EDU>

**Summary** →

**Completed**

**Total (226,751.43 USD)**

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal	226,751.43
Shipping	0.00
Handling	0.00
	<b>226,751.43</b>

**Related Documents**

[Purchase Order: AB1072796](#)

**What's next?**

Workflow

- Submitted 8/20/2025 3:24 PM
  - Submitted 8/20/2025 3:24 PM - Fritz Andrews
- 25-Commodity Code Assigner
  - Approved 8/21/2025 8:51 AM - Brian Garza



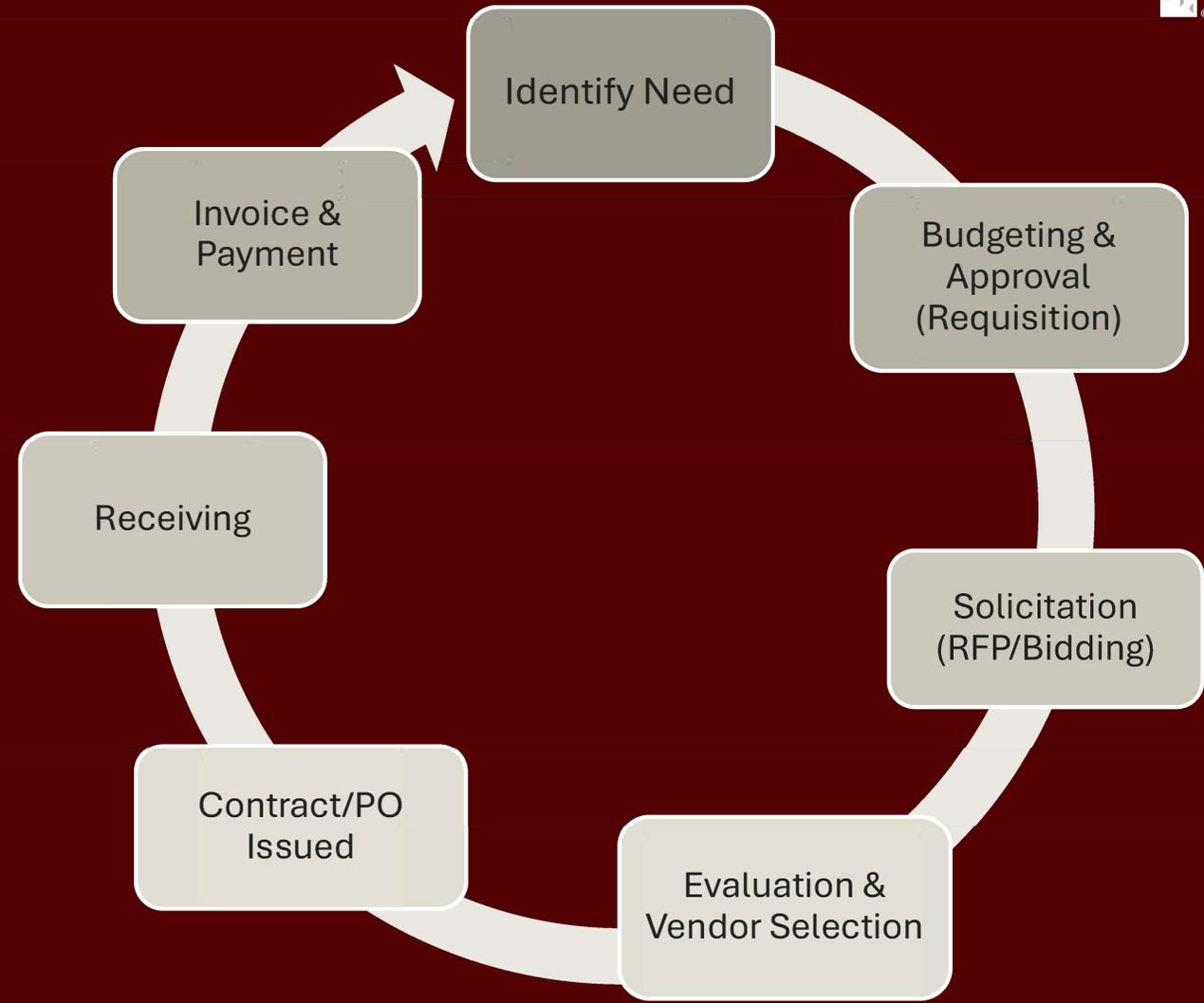
- AggieBuy Comments – Procurement Services will communicate in comments.
- Change Orders – Provide a detailed reason of what is being changed and why.
- Line-Item Description – Provide simple accurate words for product/service being purchased – Cloud Software, Office Furniture, Lab Supplies, etc., leads to proper commodity codes and better approval routing.
- Internal Attachments – Provide all backup documentation for this purchase. Quotes, sole source justification, emails – treat AggieBuy like your filing cabinet.
- Encumber Funds – Best practice is to encumber funds and pay from purchase order.
- Workflow – Good descriptions lead to correct workflow. Example – if software needs IT Accessibility & Security review and approvals.
- What's next? – AggieBuy; right side of screen – tells you where your document is and where it is going.



# Purchase Orders

# Purchase Orders cont.

- A Purchase Order (PO) is the official authorization for a vendor to provide goods or services
- Legal and binding
- No signatures required
- Routes through appropriate approvers



## **Under \$25,000**

- Issued in AggieBuy by the department utilizing a vendor quote and/or proposal.
- Ensure your quote is still valid and provides favorable terms to the university.
- Obtain vendor insurance certificates, when applicable.
- Ensure the purchase receives all required approvals (e.g. IT Security, Accessibility, Export Controls, etc.)

## **Over \$25,000**

- Issued in AggieBuy by Procurement Services from the purchase requisition submitted by TAMUSA department.
- Attach all documentation related to this purchase. Treat AggieBuy as your filing cabinet.
- Procurement Services will process your request based on dollar value, project timeline and complexity of project.
- Procurement Services will determine the procurement process that best fits the project.

# AggieBuy PO Workflows

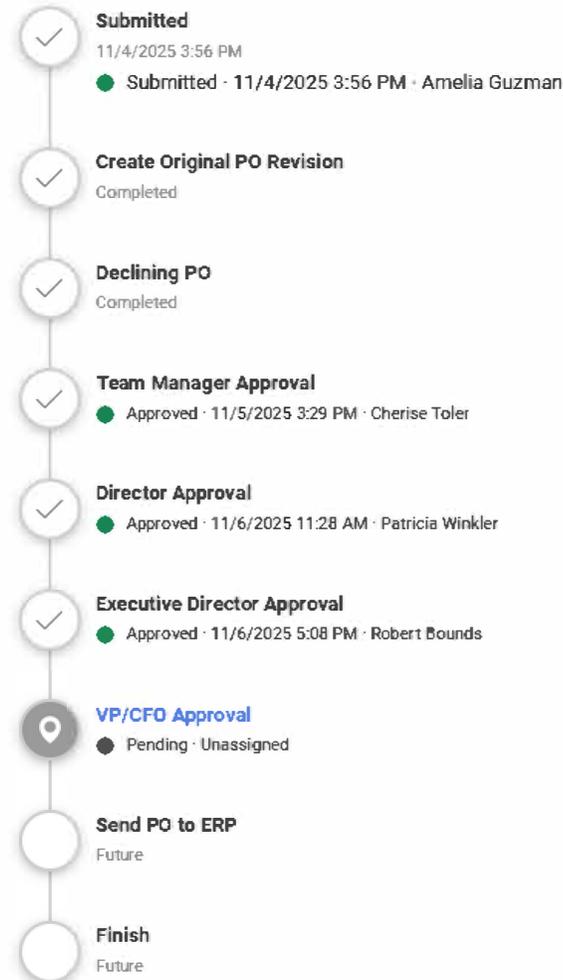
- “What’s Next” feature allows you to track previous, upcoming, and current approval steps
- Tells you who the PO is currently pending with
- Varies based on dollar value, commodity, department, etc.

## Purchase Order Workflow

What's next?

Workflow Status

Workflow





Status **Summary** Revisions 10 Confirmations Shipments Change Requests 4 Receipts 4 Invoices 8

**⚠️ You are viewing a purchase order that has been revised**

### General Information

PO/Reference No. **AB0894818**

Revision No. **9**

Supplier Name **SIEMENS ENERGY INC**

Address **10730 TALGE ROAD  
HOUSTON, Texas 77095  
United States**

Phone **+1 281-856-4400**

Purchase Order Date **2/29/2024**

Total **487,640.43**

Requisition Number **182961979** [view](#) | [print](#)

Owner **02-Texas A&M University**  
Business Unit **(02)**

Order Category **1 - Regular**

Report Reference A **no value**

Report Reference B **no value**

Sole Source (attach justification) **✗**

Contract Number **TAMU-2024-ITB-4517**

Start Date **no value**

End Date **no value**

Trade-In **✗**

### Shipping Information

Ship To

Attn: Casey Smith / Bob Henry  
Utilities & Energy Services  
Central Utility Plant Receiving  
165 Asbury St  
1584 TAMU  
College Station, TX 77843  
United States

Ship To **02-835**  
Address Code

### Delivery Options

Emergency (attach justification) **✗**

Ship Via **Best Carrier-Best Way**

Requested Delivery Date **3/1/2024**

### Buyer Information

Buyer	Buyer Email	Buyer Phone Number
jans Nelms, Jim	janelms@tamu.edu	979.845.3819

### Report Codes-1

Order Type	USAS One	USAS Two	LDT Code
HIEd Higher Ed	9 - Exempt, with legal cite	no value	65 Purchases made by an Institution of Higher Education

### Report Codes-2

### Billing/Payment

Bill To

Texas A&M University-Accounts Payable  
\*\*\*Do Not Mail Invoices\*\*\*  
Email invoices to invoices@tamu.edu  
750 Agronomy Rd Suite 3101  
6000 TAMU  
College Station, TX 77843-6000  
United States

Bill To Address **02**  
Code

### Billing Options

Accounting Date **2/16/2024**

Payment Terms **0, Net 30**

FOB / FREIGHT **Destination**

Pre-Pay & Add **✗**

Special Payment Method **no value**

### Summary

Change Requests: 208369902

Change Requests: 204731774

Change Requests: 204731535

Invoice: 159947481

Invoice: 165382165

Credit memo: 170077426

Invoice: 174029214

### What's next?

Workflow Status **Pending**

- Submitted 2/29/2024 9:56 AM
- Submitted - 2/29/2024 9:56 AM - Greg Bell
- Create Original PO Revision Completed
- Declining PO Completed
- Specialized Approvals** Pending - Unassigned
- Specialized Notification Future
- PO Distribution Future
- Send PO to ERP Future
- Finish Future



# Formal Contracts

# Formal Contracts Cont.



- A contract is legal and binding – must be reviewed by Contract Administration prior to execution
- Attach all referenced/associated agreements to your requisition (MSA, previous versions/renewal copies, etc.)
- Only authorized signers may sign
- If over delegation, a Procurement Process must be determined and established before routing to Contract Administration

*“Employees who sign contracts purporting to bind the System without authority may be personally liable to the contractor and the System, and may be subject to System disciplinary action, up to and including dismissal or discharge for cause.”*

<https://assets.system.tamus.edu/files/budgets-acct/delegation/SODelegationAuthority.pdf>

## **Under \$25,000**

- Submit directly to TAMUSA Contract Administration for review and execution
- Attach a copy of fully executed agreement to your approved procurement process

## **Over \$25,000**

- Submit requisition to Procurement Services
- Procurement Services will review and determine appropriate procurement process
- Upon Procurement approval, the purchase will be approved to route to Contract Administration
- After contract execution, Procurement Services will issue the Purchase Order

# Submitting a Requisition for Procurement and Contract Review



TEXAS A & M UNIVERSITY

Requisition • 205449662

Summary Taxes/S&H **Comments 18** Attachments 7 History

**Brian Garza - 9/10/2025 9:27:39 AM** Requisition - 205449662 - Comment Added  
CON-10762 created.  
Email sent: Cherise Toler <CTOLER@TAMU.EDU>, Cynthia Gillar <CGILLAR@TAMUSA.EDU>, Fritz Andrews <FANDREWS@TAMUSA.EDU>, Rebecca Cella <RCELLA@TAMU.EDU>

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**Related Documents**  
Purchase Order: AB1072796

**What's next?**  
Workflow

**Submitted**  
8/20/2025 3:24 PM  
Submitted - 8/20/2025 3:24 PM - Fritz Andrews

**25-Commodity Code Assigner**  
Approved - 8/21/2025 8:51 AM - Brian Garza

- Contract Administration will add the Contract Reference number
- Procurement Process approved
- Procurement approves routing to Contract Administration

# Submitting a Requisition for Procurement and Contract Review Cont.



TEXAS A&M UNIVERSITY All ▾ Search (Alt+Q)

Requisition • 205449662

Summary Taxes/S&H **Comments 18** Attachments 7 History

Records found: 18 Show comments for Requisition ▾ +

**Fritzi Andrews** - 9/25/2025 12:11:21 PM Requisition - 205449662 Comment Added ↶

Thank you everyone.

Email sent: Brian Garza <BGARZA3@TAMUSA.EDU>, Cherise Toler <CTOLER@TAMU.EDU>, Cynthia Gillar <CGILLAR@TAMUSA.EDU>, Rebecca Cella <RCELLA@TAMU.EDU>, Travis White <TWHITE1@TAMUSA.EDU>, Jessica Nino <JMNINO@TAMUSA.EDU>

**Brian Garza** - 9/25/2025 11:11:25 AM Requisition - 205449662 Comment Added ↶

Attaching executed agreement.

Email sent: Cherise Toler <CTOLER@TAMU.EDU>, Cynthia Gillar <CGILLAR@TAMUSA.EDU>, Fritzi Andrews <FANDREWS@TAMUSA.EDU>, Rebecca Cella <RCELLA@TAMU.EDU>, Travis White <TWHITE1@TAMUSA.EDU>

Attachment Added [↓ Agreement-Master-AXON Enterprise, Inc. \(Executed Copy\) \(2\).pdf](#)

Once contract is signed, Contract Administration will attach it within the requisition comments



### General

Status Pending  
Purchasing Approval-Dept (Cherise Toler)

Submitted 10/27/2025 12:35 PM

Business Unit 02-Texas A&M University (02)

Ordering Department 02-HUMR (02-HUMR)

Cart Name 2025-10-27 316003856 02

Share cart No user groups available

Prepared by Kimberly Smith

Prepared for Nicola Franklin

Cart Description/Purpose Xref Renewal

Software and/or Cloud Services (attach IT Review Form) ✗

Order Category 1 - Regular

Report Reference A At CAe 10/7/2026

Report Reference B no value

### Routing Info

Route to Procurement Services ✗

Ad-Hoc Approver Add

### Shipping

Ship To

Attn Nicola Franklin  
Human Resources Dept  
GSC  
Suited 201  
750 Agronomy Rd  
1255 TAMU  
College Station, TX 77843  
United States

### Delivery Options

Ship Via Best Carrier-Best Way

Requested Delivery Date no value

Pre-Pay & Add ✗

### Procurement Services

Buyer	Buyer Email	Buyer Phone Number
no value <span style="color: red;">✗ Required</span>	no value <span style="color: red;">✗ Required</span>	no value <span style="color: red;">✗ Required</span>

Emergency (attach justification) ✗

Sole Source (attach justification) ✗

HSP-PAR Required ✗

Contract Number	C26-02-23083
Start Date	10/24/25
End Date	10/23/26

### Billing

Bill To

Texas A&M University-Accounts Payable  
\*\*\*Do Not Mail Invoices\*\*\*  
Email invoices to invoices@tamu.edu  
750 Agronomy Rd Suite 3101  
6000 TAMU  
College Station, TX 77843-6000  
United States

### Accounting Info

Do Not Encumber ✗

Rush the Pymt Process ✗

Special Payment Method no value

Cost Receipt Required ✗

IFR (Item for Resale) ✗

Trade-In ✗

Create Asset Manually ✗

Add to Asset Number no value

### Report Codes-1

Order Type	USAS One	USAS Two	LDT Code
HiEd Higher Ed	9 - Exempt, with legal cite	no value	65 Purchases made by an Institution of Higher Education

### Summary

- ✔ Submitted 10/27/2025 12:35 PM  
Submitted - 10/27/2025 12:35 PM - Kimberly Smith  
On behalf of: Nicola Franklin
- ✔ Department Allocator Approved - 10/28/2025 2:28 PM - Erica Vazquez
- ✔ Commodity Code Assigner Approved - 10/28/2025 2:37 PM - Tyler Young
- ✔ Budget Check Completed
- ✔ Final Dept Approver Approved - 10/28/2025 2:46 PM - Stephen Schulze
- ✔ Specialized Approvals Approved - 10/28/2025 3:19 PM - Puneet Gaddam  
Approved - 11/6/2025 7:14 PM - David Sustaita
- ✔ Specialized Notification Notification Sent
- ✔ Budget Check 2 Completed
- ✔ Budget Check 2 Complete Notification Sent
- ✔ PR Encumbrance Completed
- ⏸ Purchasing Approval-Dept  
On Hold - Cherise Toler

# Important Fields

- Contract Submittal Date
- Bids Due Date
- Contract Number
- Start Date
- End Date
- Hold Status
- Pending Approver



Approve/Complete & Show Next | 1 of 6 Results

Status Summary Revisions 1 Confirmations Shipments Change Requests Receipts Invoices Comments

Line	Status	Item	Catalog	Size/Packaging	Unit Price	Quantity	Ext. Price
1		FY 26 Cloud Software Fee	n/a	USD	122,976.00	Qty: 1 USD	122,976.00
<b>ITEM DETAILS</b> Contract: no value      Requisition Number: 204232818 view   print Taxable: <input checked="" type="checkbox"/> External Note: no value Capital Expense: <input checked="" type="checkbox"/> Attachments for supplier: Add Commodity Code: 99900096 / Software Usage Fees or Rental of Software   5830							
2		FY 27 Cloud Software Fee	n/a	USD	126,665.00	Qty: 1 USD	126,665.00
<b>ITEM DETAILS</b> Contract: no value      Requisition Number: 204232818 view   print Taxable: <input checked="" type="checkbox"/> External Note: no value Capital Expense: <input checked="" type="checkbox"/> Attachments for supplier: Add Commodity Code: 99900096 / Software Usage Fees or Rental of Software   5830							
<b>ACCOUNTING CODES</b> Values have been overridden for this line							
3		FY 28 Cloud Software Fee	n/a	USD	130,465.00	Qty: 1 USD	130,465.00
<b>ITEM DETAILS</b> Contract: no value      Requisition Number: 204232818 view   print							

Summary Pending

**Be aware of these issues.**  
You may review and proceed.

A contract has not been selected for one or more lines where one is available for assignment.: Contract

**Details**

Supplier Status

**New Order**

Supplier  
LAMAR INSTITUTE OF TECHNOLOGY

**Total (418,627.00 USD)**

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal	418,627.00
Shipping	0.00
Handling	0.00
<b>Total</b>	<b>418,627.00</b>

**Related Documents**

Requisition: 204232818

**What's next?**

Workflow Status: Pending

Workflow

## Ensure your purchase order matches the formal contract

- Supplier Name
- Total Contract Value (TCV)
- Itemize products/ services and years, if applicable to ensure full compliance

# Summary: Formal Contracts



TEXAS A&M  
UNIVERSITY®

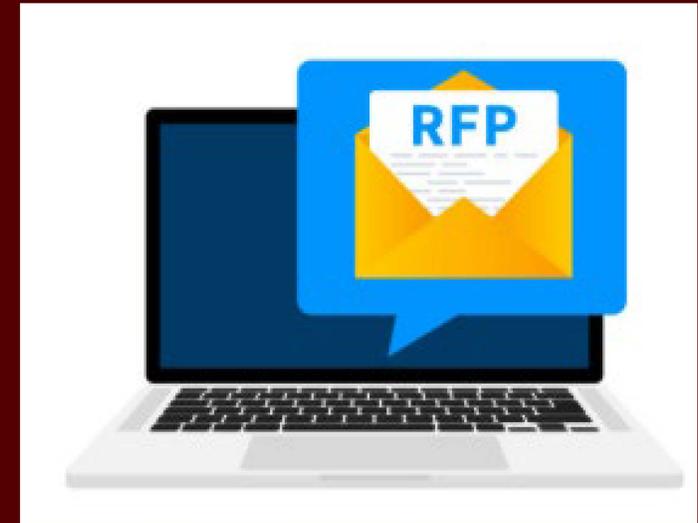
- Ensure your purchase order matches the formal contract.
  - Supplier Name
  - Total Contract Value (TCV)
  - All products or services are itemized to ensure full compliance
- Attach a fully executed copy to the AggieBuy file.
- Use the Start and End date fields to help keep track of the contract term. This will help when processing renewals and/or amendments to the contract.
- Formal contracts must be signed by the appropriate person, which is determined by TAMUSA Contract Administrations. If you sign a contract without the proper authority, you could be held personally liable for the purchase.
- REMINDER – if TCV exceeds \$25K, your purchase MUST be approved by Procurement Services prior to the execution of your formal contract. Contracts executed without proper approvals will be subject to the non-compliant purchase policy.



# Sourcing Events

# When is a solicitation needed?

- Competitive Bidding is Required
  - Price competition is available
  - Equivalent or proprietary (brand-specific)
  - More than one supplier can provide requested goods/services
  - Not available under an existing agreement or exemption
- Benefits:
  - Vendor Accountability
  - Acceptance of our standard terms and conditions
  - Ensures best value for the university
  - Compliance with state laws and university policies & procedures



## Informal Bid



- \$25,000 - \$50,000
- No minimum posting requirements
- Solicit to at least 2 HUB vendors and 1 Trade Organization
- Award based on price
- Need scope of work or definition of needs

## Formal Bid



- \$50,000+
- Must be posted publicly for a minimum of 2-3 weeks based on value
- Award based on price
- Used to establish Master Orders/Purchase Orders
- Need scope of work or definition of needs

*Procurement Services will work with you to determine the appropriate method.*

# AggieBuy Sourcing Module - Buyer's View



[Home](#)
[Shop](#)
[Orders](#)
[Contracts](#)
[Accounts Payable](#)
[Pay](#)
[Suppliers](#)
[Sourcing](#)
[Reporting](#)
[Administer](#)

TEXAS A&M UNIVERSITY

Alle

79.99 USD
82
586

Sourcing • Sourcing Events Dashboard

### Sourcing Event Summary

[Filter Sourcing Events](#)

241 Total Sourcing Events

Status	Count (Approximate)
Awarded	145
Under Evaluation	45
Open	25
Draft	15
Closed Without Awarding	10
Withdrawn	11

1-6 of 6 Results | High to Low | 10 Per Page

#### Sourcing Event Search



[Advanced Search](#)

#### Quick Links

- [Create New Event...](#)
- [My Sourcing Events to Approve](#)
- [My Sourcing Events to Evaluate](#)
- [Add Suppliers](#)

### Key Event Dates

[Filter Sourcing Events](#)

Date Range

Include Draft and Pending Events

Current Status	Next Key Event	Scheduled On	Event Number	Type	Title	Owners
<span style="background-color: #0070C0; color: white; padding: 2px;">Open</span>	Under Evaluation	11/12/2025 2:00:00 PM	<a href="#">28-EQUHTB-1638</a>	Invitation to Bid	Knee Milling Machine	Danielle Toler
<span style="background-color: #0070C0; color: white; padding: 2px;">Open</span>	Under Evaluation	11/12/2025 2:00:00 PM	<a href="#">28-EQUHTB-1635</a>	Invitation to Bid	Discovery DSC25	Danielle Toler

TEXAS A&M UNIVERSITY

Alle Search (Alt+Q) 79.99 USD Logout

Sourcing > Sourcing Events > Search Events

< Back to Results 37 of 42 Results

This event has been amended. [View amendment changes.](#)  
 This event is **Under Evaluation**. You may view responses.  
 You are reviewing a sourcing event currently assigned to the approver **Kristina Kanevsky**

**Pool of Vendors, Master Agreement to Provide Dredging Services**  
 TAMUG-ITB-26-0110  
 Type: Invitation to Bid  
 Event Status: **Under Evaluation**  
 For Requisition: **204732999**

Supplier Responses

73 Invited Suppliers

Progress	Response % Complete	Supplier Name	Required Items Total Bid	Optional Items Total Bid	
Submitted	100%	CALLAN MARINE LTD	81,020.00 USD	1,700.00 USD	View Response
Submitted	100%	Huffman Marine Contractors	50,325.00 USD	0.00 USD	View Response
Submitted	100%	Viking Dredging LLC	75,010.00 USD	0.00 USD	View Response
Response In Progress	8%	Brizo Construction, LLC	-	-	
Response In Progress	8%	Clutch City Metals, LLC	-	-	
Response In Progress	8%	US Commercial Diving	-	-	
No Bid	8%	GFL Environmental Services	-	-	
No Bid	8%	Good News Ranch	-	-	

Save Progress



Unique sourcing event number

Connects to requisition number

Suppliers submit pricing/bid through the module

Requisition • 204732999



Assign & Further Actions

- Summary
- Taxes/S&H
- P Preview
- Comments 3**
- Attachments 1
- History

Prepared for David Klapproth

Cart no value

Description/Purpose

Software and/or Cloud Services (attach IT Review Form)

Order Category 1 - Regular

Report Reference A no value

Report Reference B **Bid Review 11/12**

Routing Info

Route to Procurement Services ✓

Procurement Services

Buyer	Buyer Email	Buyer Phone Number
kakt Kanevsky, Kristina	kkanevsky@tamu.edu	979.458.8002

Emergency (attach justification)

Sole Source (attach justification)

HSP-PAR Required

Contract Number

**TAMUG-ITB-25-0110**

Start Date no value

End Date no value

Special Payment Method no value

Cost Receipt Required ✗

IFR (Item for Resale) ✗

Trade-In ✗

Create Asset Manually ✗

Add to Asset Number no value

Report Codes-1

Order Type	USAS One	USAS Two	LDT Code
	no value	no value	no value

Report Codes-2

Contract Workforce	✗
State Order Number	no value
Non-Compliant	✗
Basis of Award	no value

Summary

Pending

Total (0.00 USD)

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal	0.00
Shipping	0.00
Handling	0.00
<b>Total</b>	<b>0.00</b>

Related Documents

[View Associated Sourcing Events](#)

What's next?

Workflow

Submitted  
8/8/2025 11:04 AM  
Submitted: 8/8/2025 11:04 AM  
Morgan Mills  
On behalf of: David Klapproth

Commodity Code Assigner  
Approved: 8/12/2025 5:39 PM  
Amanda Conley



Sourcing Events Initiated for Items on this Requisition

Requisition Number 204732999

**Sourcing Events**

- [TAMUG-ITB-25-0078](#)  
'Pool of Vendors, Master Agreement to Provide Dredging Services'  
No Bid Awarded
- [TAMUG-ITB-26-0110](#)  
'Pool of Vendors, Master Agreement to Provide Dredging Services'  
**Out For Bid**



Requisition • 204732999

Summary Tasks/S&H PO Preview Comments 3 Attachments 1 History

### Sourcing Event Information

Event Number: TAMUG-ITB-26-0110 [Go to Sourcing Event](#)

Event Title: Pool of Vendors, Master Agreement to Provide Dredging Services

General Information		Event Timeline		Suppliers and Responses	
Original PR Number	204732999	Create Date	10/2/2025 8:32 AM	# of Invitations	73
Awarded PR Number	To Be Assigned	Release Date	To Be Assigned	# of Suppliers Intending to Bid	6
Work Group	Vessel Operations	Open Date	10/2/2025 12:00 AM	# of Bids Submitted	3
Event Administrator	<a href="mailto:KKANEVSKY@TAMU.EDU">KKANEVSKY@TAMU.EDU</a>	Close Date	11/4/2025 2:00 PM		
Event Type	Invitation to Bid	Sealed Bid Open Date	11/4/2025 2:00 PM		
Event Status	Under Evaluation	Award Date	To Be Assigned		

Close

Access to bid status/ information



# Bid Review Process

- Procurement Services will provide a Bid Review packet which includes:
  - Tabulation Sheet – summary of all bids received, vendors that were disqualified and why, vendor pricing, payment terms, delivery days, freight terms, etc.
  - All solicitation documents provided by the vendor
  - Bid Review cover letter – requesting your approval
- Department will review the Bid Review packet
  - Ensure the recommended vendor meets your needs & budget
  - Verify pricing, model/brand of products, services are what is expected, etc.
  - Return the cover letter with your approval

# Bid Review Cover Letter

- Select the appropriate award notification option.
- Provide explanation for option selected.
- Sign and date.
- Return to Procurement Services via comments in AggieBuy.



DIVISION OF FINANCE  
Procurement Services

February 7, 2025

To: Dell Hamilton  
Transportation Services

From: Patty Winkler, C.P.M.  
Procurement Services

**\*\*Return this sheet only with recommendations by 2/14/25  
Fax information to 979-862-3383 or e-mail to [p-winkler@tamu.edu](mailto:p-winkler@tamu.edu)**

Attached are the results from our recent Invitation for Bid **TAMU-ITB-25-4722 (190029719)**

It appears that an award may be made to **Nextgen Parking LLC** based upon the "Best Value Criteria" as specified on the Invitation for Bid. Please review the attached tab sheet, all bids, literature, and provide your recommendation for award.

If you do not agree with this analysis, provide your recommendation below to include justification for the recommendation based upon the specifications and best value criteria outlined in the bid. All vendors not meeting the criteria must be disqualified on an individual basis until the vendor that meets the requirements as written is identified.

Please fill out and sign below as indicated and return to [p-winkler@tamu.edu](mailto:p-winkler@tamu.edu) or fax to 979-862-5117. An award cannot be made until your approval is received.

If you have questions, please call me at 979-845-4556.

Award to vendor as indicated above.

Award to another vendor as indicated, based on the criteria outlined below

Do not award to any vendor based on the reasons outlined below. (indicate rebid or cancellation of request)

Explanation for option selected: \_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_  
Signature Phone Date



# Sample Tabulation

Tabulation will provide all necessary information you need to make the decision for award.

Bid # 02-UPRS-ITB-0485 (103519327) Due Date: 6/13/18 Buyer: paw	Lumina Datamatics, Inc. 4 Collins Ave Plymouth MA 02184 Sendil Mourougane 732-770-3506 sendil.mourougane@luminad.com	GRAPHIC COMPOSITION INC 186 Ben Burton Circle Suite 300 Bogart GA 30622 Brian Edenfield 706-546-8688 x 19 briane@gcitype.com	Scribe Inc 842 South Second Street Philadelphia PA 19147 215-336-5094 David Alan Rech drech@scribenet.com
Total Bid	444.16	1,575.92	1,602.80
Payment Terms:	Net 30	Net 30	Net 30
Shipping Terms:	Destination	Destination	Destination
Samples	Provided	Waiver attached	Provided
References	Provided	Waiver attached	Provided
P1.1 Basic Typesetting Rates for Text - Set from Editorially correct/coded disk files			
Unit Price	0.56	1.25	3.50
Item Total Price	0.56	1.25	3.50
Quantity	1	1	1
P1.2 Basic Typesetting Rates for Text - Set from Disk Files			
Unit Price	1.75	1.70	4.00
Item Total Price	1.75	1.70	4.00
Quantity	1	1	1
Comment (Optional)	We assume that Lumina will receive raw manuscript from which needs to be pre-edited and copyedited for typesetting. Then, the edited word file needs to be flow into InDesign template and create PDF proofs.		We usually turn around typeset only in 1 week to first pages. We will meet all specifications outlined in your documents and your schedules as you need
P1.3 Composition Upcharges - Display Math			
Unit Price	0.23	1.00	0.80
Item Total Price	0.23	1.00	0.80
Quantity	1	1	1
Comment (Optional)	Assume that from 1,000 characters we have taken 1% for Display Math Equation and worked out the price.	500-1500% markup	Scribe charges \$52.00 per hour to enter math. We average .80 per formula, so can work either by the



# Group Purchasing Agreements

## **Group Purchasing Organization (GPO)**

- Pools purchasing power to negotiate discounts with vendors and manufactures
- Pre-negotiated contracts provide speed and compliance
- Vendor quote must reference contract number
- Procurement verifies contract validity and pricing

**1**

**No bidding required**

**2**

**Best price is negotiated**

**3**

**Ease of order placement**

**4**

**Time efficiency**

**5**

**Compliance**

# Common Group Purchasing Organizations



- E&I Cooperative Services  
<https://www.eandi.org/>
- Omnia Partners  
<https://www.omniapartners.com/industries/higher-education>
- Choice Partners  
<https://www.choicepartners.org/>
- TIPS-USA  
<https://www.tips-usa.com/>
- Sourcewell  
<https://www.sourcewell-mn.gov/>
- The University of Texas Supply Chain Alliance  
<https://www.utsystem.edu/offices/collaborative-business-services/supply-chain-alliance>
- Texas Department of Information Resources – DIR\*\*  
<https://dir.texas.gov/>  
\*\*not a GPO, but a State of Texas Agency

# Confirming GPOs/Existing Agreement

- All purchases that exceed \$25K, must be submitted through Procurement Services for processing
- Attach copy of vendor quote to AggieBuy purchase requisition
- Ensure the contract number is referenced on the quote



Upon receipt of the purchase requisition, Procurement Services will:

- **Confirm the GPO (or TAMU/TAMUS contract) and attach documentation**
- **Confirm the items being purchased mirror the contract referenced**
- **Confirm all purchase terms are favorable to the university**

# POWER LIFT®

Power Lift Acquisitions

P.O. Box 348  
 Jefferson, IA 50129  
 800-872-1543  
[www.power-lift.com](http://www.power-lift.com)

## Quotation / Order - DB Rack Trays, DB Rack, & Additional DB's - v1

BuyBoard #:764-25

### Texas A&M Sports Performance

Quoted To: Rick Karasch  
 520.603.9709  
[rkarasch@athletics.tamu.edu](mailto:rkarasch@athletics.tamu.edu)

Ship To: Texas A&M Sports Performance - Player Development Center  
 756 Houston Street  
 College Station, TX 77843

Sales Representative	Date	Prices Good Thru	Terms	Freight
Shaun McPherson	10/23/2025	30 Days	Net 10	Best Way

QTY.	ITEM #	DESCRIPTION	UNIT PRICE	NET AMOUNT
<b>POWER LIFT</b>				
<b>POWER LIFT - DUMBBELL RACKS</b>				
1	MDB3-15 33037C	<b>3-Tier "15 Pair" Dumbbell Rack</b> <i>w/ 3 Saddled DB Tiers - 5 pair per tier / 15 pair total</i> <i>w/ Platinum Frame / Black Decals</i>	\$3,369.00	\$3,369.00
3	33064	<b>3 Tier DB Rack - Bottom Tray w/ Saddles - Addition</b> <i>w/ Additional Tray added to Existing DB Racks</i> <i>w/ Black Wrinkle Finish</i>	\$1,069.00	\$3,207.00
<b>IRON GRIP BARBELL</b>				
2	UDB-SSS-020	<b>Urethane Dumbbell Pair - 20lb</b>	\$436.00	\$872.00
2	UDB-SSS-022.5	<b>Urethane Dumbbell Pair - 22.5lb</b>	\$460.00	\$920.00
2	UDB-SSS-025	<b>Urethane Dumbbell Pair - 25lb</b>	\$490.00	\$980.00
2	UDB-SSS-027.5	<b>Urethane Dumbbell Pair - 27.5lb</b>	\$516.00	\$1,032.00
2	UDB-SSS-030	<b>Urethane Dumbbell Pair - 30lb</b>	\$542.00	\$1,084.00
2	UDB-SSS-032.5	<b>Urethane Dumbbell Pair - 32.5lb</b>	\$570.00	\$1,140.00
2	UDB-SSS-035	<b>Urethane Dumbbell Pair - 35lb</b>	\$598.00	\$1,196.00
2	UDB-SSS-037.5	<b>Urethane Dumbbell Pair - 37.5lb</b>	\$624.00	\$1,248.00
2	UDB-SSS-040	<b>Urethane Dumbbell Pair - 40lb</b>	\$652.00	\$1,304.00
2	UDB-SSS-042.5	<b>Urethane Dumbbell Pair - 42.5lb</b>	\$676.00	\$1,352.00
2	UDB-SSS-045	<b>Urethane Dumbbell Pair - 45lb</b>	\$706.00	\$1,412.00



Vendor References the GPO agreement on the quote

Procurement will attempt to negotiate these

Procurement will verify the quote is still valid/not expired



# TAMUSA – HUB Program

Cindy Gillar

HUB Coordinator

% of Dollars Spent with HUBs in FY24 **38.27%**

% of Dollars Spent with HUBs in FY25 **18.06%**

In FY24 Commodities % was **53.64%** and in FY25 **19.04%**

**Our over all goal for FY26 is 27.63%**



TOGETHER, WE STAND AS  
**A FORCE FOR GOOD**