

UCF Procurement Services



UCF

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Assist Data Input
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MISSION

To support the academic and administrative departments in the timely and competitive procurement of goods and services to sustain, foster, and promote the educational and research mission of the university. This shall be accomplished in the most ethical, efficient, and courteous manner possible while adhering to the letter and intent of all applicable laws, regulations and policies.

Process and Administer Formal Solicitations

Process Requisitions for Goods and Services

Supplier Data Input for Corporate Suppliers

Review and Approve Contracts

Manage Diversity in Contracts Program

FY16/17 Performance

Savings
\$19.3M

POs Processed
7,771

**Diversity in
Contracts**
\$19.6M

**Contracts
Reviewed and
Approved**
573

**Formal
Solicitations**
30

Supplier Data Input
1,773

Getting Started

Clearly define your need

Determine total estimated dollar amount
(consider aggregate costs)

Is there an existing UCF contract?

Is there a contract you can piggyback?

Is the funding agency directing you to a
particular vendor?

Price Threshold Guidelines

\$10,000 and below

Quotes are not required but are encouraged



\$10,000.01 - \$35,000

Two or more informal quotes are required



\$35,000.01 - \$75,000

Three or more written quotes from competing suppliers



Over \$75,000

Formal competitive solicitations or exempted from competition

Note: Procurement Services reserves the right to bid any requirement, regardless of dollar value, when determined to be in the best interest of the University.

We encourage obtaining quotes at each level from diverse vendors (small, woman or minority-owned businesses, etc.)

PCard

Program is managed by Finance & Accounting

Must be used for purchases under \$500, unless they meet the criteria of the requisition standard departmental comment DEP-017; rationale for PO <\$500

Primarily for purchases under \$5,000

Over \$5,000 requires F&A approval and a purchase order prior to the transaction

Funds: E&G, Auxiliary, Sponsored Research, Contracts and Grants, Local/Agency, Concessions

For a list of prohibited purchases, visit:

<https://fa.ucf.edu/wp-content/uploads/sites/2/prohibUses.pdf>

Request for Information (RFI)

Informal research and information gathering document used to learn about the options available for addressing a particular need or want

Information received may help to create viable requirements for a potential solicitation

Cannot be used to make an award -- only a fact finder for a solicitation

Competition Type: Invitation to Bid (ITB)

Formal solicitation process through Procurement Services

- Detailed specifications for a specific good or service
- Requirements outlined to the point suppliers can bid on the same items
- Method of Award: Lowest responsive and responsible bidder meeting specifications

End User Responsibilities

- Develop specifications/requirements
- Provide list of known suppliers with contact information
- Review bid tabulation with Procurement Specialist
- Approve lowest responsive and responsible bidder

Average Cycle Time

- 10 days: urgent
- 30 days: routine and clean specifications
- 60 days: complex

Competition Type: Invitation to Negotiate (ITN)

Formal solicitation process through Procurement Services

- Preferred method for complex purchases where specifications are not clearly defined
- Suppliers propose best solutions

Method of Award

- Best interest to the university
- Consideration of multiple criteria
- Points-based evaluation

End User Responsibilities

- Develop specifications/requirements
- Develop and design evaluation criteria
- Provide list of known suppliers with contact information

Competition Type: Invitation to Negotiate (ITN) Cont.

Decision Maker

- Assigned by Vice President for Administration & Finance and Chief Financial Officer
- Recommends members for evaluation committee
- Final decision making authority

Average Cycle Time

- 40 days: urgent
- 90 days: routine and clean specifications
- 180 days: complex

Exemption Type: Waiver /Sole Source

	Waiver of Competition	Sole Source
Dollar Thresholds	\$10,000.01 - \$75,000	\$75,000.01+
Approvals	<ul style="list-style-type: none"> \$10,000.01 - \$35,000 PI/Researcher/Director/Chair \$35,000.01 - \$75,000 Associate Dean/Associate Vice President/Associate Provost Procurement Specialist Director/Designee 	<ul style="list-style-type: none"> PI/Researcher/Director/Chair Dean/Vice President/President Procurement Specialist Associate Director Director Vice President Administration and Finance and Chief Financial Officer (routinely confers with Provost for purchases related to Academia)
Notifications	None	Posted on Procurement Services Website for 72 business hours

Exemption Type: Waiver/Sole Source Cont.

Not to be used to avoid competition

Complete Certification Form

- Describe product/service and use in layman's language
- State in detail why only this and no other product/service will satisfy your requirements
- Explain the research conducted to support the claim that only this vendor can fulfill the requirement
- Provide an explanation to support the belief that the price is fair and reasonable

Exemptions

Adoptable/Piggyback Contracts

Any active public contract

- State of Florida; Department of Management Services
- Any university or college nation-wide
- Federal, State, County, City, School Board, etc.

Cooperative Purchasing Contracts

- Educational and Institutional Consortium (E&I)
- The Cooperative Purchasing Network (TCPN)
- US Communities Government Purchasing Alliance
- National Joint Powers Alliance (NJPA)
- WSCA-NASPO Cooperative Purchasing Organization

Note: Must have been competitively solicited and awarded, same scope of work and contract dates be effective

Additional Exemptions

Grants

- Item and vendor must be specified in grantor award letter
- Include letter of award with the purchase requisition
- Final review and approval by Procurement Services
- Include the specifications and the specified vendor in the grant proposal to facilitate grantors approving the item(s) and vendor

Annual Exemption Certifications

- http://procurement.ucf.edu/wp-content/uploads/sites/3/2017/07/17-18_Sole-Source-Purchaes-Annual-Certification.pdf

Unauthorized Procurement Actions

What is it and how do they occur?

- When university funds are committed without appropriate procurement methods (i.e., purchase order, contract, PCard, etc.)
 - Submitting a requisition, agreement or contract after placing a verbal order for goods/services
- Contract is signed by a person(s) not authorized per most recent [Signature Authority List](#)
 - Includes signing contracts for amounts greater than authorized

Unsure of total/final cost?

- Create a requisition for an estimated amount. If the final cost is more, then create a change order for the additional funds.

Unauthorized Procurement Actions

Violation of UCF Policies [2.102.2](#), [2.107.4](#) and Regulation [7.130](#)

Penalties for non-compliance

- First violation: written reminder
- Second violation: \$500 fine
- Third violation: \$1,000 fine
- Progressive discipline per policy, up to and including termination

Consequences to university's resources and reputation

Violators could be directed to pay the supplier with personal funds

Unauthorized Procurement Action Form must be signed by VP/Dean (NO designee)

Contract Review

All contracts requiring signatures must route through Cobblestone; workflow and approvals are managed by General Counsel's Office

Contract requirements include background information, what is being purchased, term dates, renewals, total dollar value (bid/quote guidelines)

Contracts for software/hardware require IT review, IRR form (over \$20,000), ISO form

Vehicle leases require a Motor Vehicle Approval Form and schedule from leasing company

Include all historical documents and notes when possible (original contract, past amendments or modifications)

Approval and Signature are separate actions; Procurement may approve a contract, but it may be signed by a different party

Helpful Requisition Tips

Requisitions under \$500 require a PCard Waiver Statement in the requisition header (DEP-017)

Ensure descriptions used on requisition lines are clear

Mirror quote(s) received, line by line (except for furniture)

Blanket purchase orders are valid for the current fiscal year only

Use same product category for shipping/handling as what you are buying (i.e. furniture, office supplies, etc.)

Do not reference exemptions on the requisition – Procurement Services reviews and determines the appropriate exemption, if applicable

Include contact information in the requisition header if you are requesting the purchase order be emailed to you directly

Supplier Data Input

Corporate suppliers (domestic and foreign) only; use of Employer Identification Number (EIN) on the W-9 Form

- Domestic suppliers use an updated IRS form or UCF's Substitute W-9
- Foreign suppliers must use a W8 BEN-E form
 - Commodity purchases will be entered directly by Procurement Services
 - Services require UCF Global approval first

Supplier Changes

- Supplier name, EIN, or main address changes require a new W-9
- Remit to address changes must be evidenced with an updated invoice, letterhead or memo from the supplier
- Contact information can be updated via email request

All suppliers are vetted through IRS TIN Matching System and/or International Trade Compliance and Visual Compliance

Documents can be faxed or emailed to 407-823-2551 or procurement@ucf.edu

Additional information on the Procurement Services Website and Supplier Webpage
<http://procurement.ucf.edu/vendors-general-information/>

Diversity in Contracts Program

<https://procurement.ucf.edu/diversity-about/>

Assist businesses that are small or historically underutilized navigate the procurement process at UCF

Include small and diverse businesses in your procurement opportunities

Volunteer to be a Diversity Liaison

Contact us for additional information

Procurement Services Website

www.procurement.ucf.edu

News and Information

Solicitations

Forms

Guidelines

Vendors

Contracts

Diversity in Contracts

Links

FAQ

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Any questions?

Thank you!



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