

UNIVERSITY OF CENTRAL FLORIDA

PROCUREMENT SERVICES

PROCEDURES MANUAL

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1. INTRODUCTION & POLICY

A. Introduction

Procurement Services is an important function of administrative management at the University of Central Florida. The procurement function is assigned to the Procurement Services Department, which is a service department organized to support the students, the instructional and research efforts of faculty and staff, as well as other university service departments.

Procurement Services involves the acquisition of equipment furnishings, supplies, facility improvement services, preventive maintenance services, contractual services, and leases of space for the university within pre-established budgetary constraints. Procurement Services also includes assisting with the planning and preparation of invitation to bid and invitation to negotiate specifications; initiating formal quotations, invitation to bid and invitation to negotiate; conducting public bid and proposal openings; evaluating bids and proposals and awarding and administering all contracts until final completion or termination.

This manual reflects the statutory requirements of the State of Florida, rules and directives established by the Board of Governors and UCF Board of Trustees, and standard practices in the public university system of Florida, as applicable. The requirements stated herein shall apply to all purchases of commodities and services whether funded by state appropriation, grants, contracts, etc., except donated and university direct-support organizations support funds (concession funds, UCF Foundation, UCF Athletics Association, Alumni Association non-appropriated funds, etc.) which may be expended as directed by the President.

B. Mission Statement

The mission of the University of Central Florida Procurement Services Department is 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.

C. Staff

(See [Procurement Services Staff](#))

D. Authority and Responsibility

Board of Governors (BOG) Regulation Chapter 18, and [University of Central Florida \(UCF\) Regulation 7.130](#). The Board of Trustees constitutes the contracting agent of the university. The president is the chief executive officer of the university and is responsible for its operation and administration. The president or the president's designee is vested with the powers, duties, and authority that are vested in the

university. In accordance with UCF Regulations, the University Board of Trustees has authority to establish a system of coordinated procurement policies, procedures, and practices to be used in acquiring commodities and contractual services required by the university. The Procurement Services department has the duty to:

1. Develop procurement procedures.
2. Canvas sources of supply and contracting, including Small, Minority, Woman, Veteran Business Enterprises (SMWVBE), for the purchase or lease of all commodities and contractual services for the university in any manner, including purchase by installment or lease-purchase contracts. Installment or lease-purchase contracts may provide for the payment of interest on unpaid portions of the purchase price.
3. Recommend or advise the suspension or debarment of a contractor in accordance with [UCF Regulation 7.124](#).
4. Plan and coordinate purchases in volume and negotiate and execute agreements and contracts for commodities and contractual services under which the university may make purchases.
5. Develop an Annual Certification List to serve as a waiver of the competitive solicitation requirement for commodities/services that are frequently purchased and are available from a single source.
6. Evaluate and approve contracts lead by the Federal Government, other states, political subdivisions, or any independent college or university, or educational or other cooperative or educational consortium for the procurement of commodities and contractual services, when it is determined to be cost-effective and in the best interest of the university to make purchases under contracts lead by such other entities.
7. Elect as an alternative to any provision in BOG Regulation 18.002 to proceed with a bid solicitation or contract award process when it is set forth, in writing, that the particular facts and circumstances will demonstrate that the delay due to staying the solicitation or contract award process would be detrimental to the interests of the university. After the award of contract resulting from a competitive solicitation in which a timely protest was received and in which the university did not prevail, the contract may be canceled and re-awarded to the prevailing party.
8. Award contracts for commodities and contractual services to multiple suppliers, including SMWVBEs if it is determined to be in the best interest of the university. Such awards may be on a university, regional or multiple state university-wide basis and the contracts may be for multiple years.
9. Reject or cancel any or all competitive solicitations when determined to be in the best interest of the institution.
10. Inspect the part of the plant or place of business to determine the capability of contract performance of a contractor or any subcontractor which is related to the performance of any contract awarded or to be awarded by the university.
11. Prescribe the methods of securing bids or negotiating and awarding contracts.
12. Negotiate the best terms and conditions, from the source determined by the Procurement Services Department to be in the best interests of the university, in the event that no bids are received.

13. Develop, distribute, and maintain the policies and procedures manual of the University Procurement Services Department.

E. Authority to Purchase (Departments Other Than Procurement Services)

All contracts shall be in compliance with the provisions of [UCF Regulation 7.130](#) and must be reviewed by the university general counsel's office according to [UCF Policy 2-102.3](#). Signature authority for entities other than the Procurement Services Department is set out in [UCF Policy 2-107.4](#), Signature Authority Policy. Department heads authorized to execute contracts may, for periods of their temporary absence, delegate this authority in writing.

Only university employees who have a written document specifically delegating signature authority can sign contracts on behalf of the university, regardless of dollar amount. Individuals who enter into contracts without signature authority may subject their departments or units to fines. Such individuals may also be personally liable under the contract.

Penalties for non-compliance

1. First violation- written reminder to the head of the department or unit of the requirements of the policy.
2. Second violation- five hundred dollar fine assessed against the department or unit.
3. Third and subsequent violation- one thousand dollar fine assessed against the department or unit.
4. In addition to the above and concurrent with each violation, the individual signing without authority shall be subject to progressive discipline consistent with existing policy, up to and including termination.

F. Ethics and Standard of Conduct

All university personnel engaged in procurement and related activities shall conduct business dealings in a manner above reproach in every respect. Transactions relating to expenditure of public funds require the highest degree of public trust to protect the interests of the university and the taxpayers of Florida. All university personnel engaged in the procurement cycle are bound by the standard of conduct for public officers and employees set forth in chapter 112, part 3 ([Standards of Conduct](#)) Florida Statutes and shall file a Conflict of Interest Statement annually.

G. Conflict of Interests and Gratuities: [UCF Policy 4-504.2](#)

As part of UCF's metropolitan research university mission, the university encourages its employees to participate in sponsored research, consulting, and other activities that may benefit the participants, UCF, and the public. In doing so, UCF employees are obligated to act in the best interest of the university and ensure that outside activities or outside financial interests do not interfere with their obligation to the university. When a situation arises that generates a potential conflict of interest or commitment, or the appearance of a conflict, the employee must report the activity. The disclosure form is subject to review by the employee's supervisor and other university personnel.

Management of a potential conflict of interest or commitment is determined on a case by case basis.

1. Conflict of Interest: It shall be a breach of ethical standards for any employee of the university to participate directly or indirectly in the procurement process when the employee knows that:
 - a. He/she or any member of his/her immediate family (spouse, children, parents, brothers or sisters) will benefit from a university procurement transaction;
 - b. A business or organization in which he/she, or any member of his/her family as indicated above, has a financial interest and will benefit from a university procurement transaction; or,
 - c. Any other person, business, or organization in which whom he/she or any member of his/her immediate family is negotiating or has an arrangement for employment and will ultimately benefit from a university procurement transaction.
 - d. All employees having a financial interest in a private concern shall file a statement annually with the president disclosing such interest.

2. Gratuities: [UCF Regulation 7.130](#)

It shall be a breach of ethical standards: (a) for any employee of the university to accept, solicit, or agree to accept a gratuity of any kind, form or type in connection with any contract for commodities or services; (b) for any potential contractor to offer an employee of the university a gratuity of any kind, form or type to influence the development of a contract or potential contract for commodities or services; or (c) for any university or university direct support organization employee participating on a procurement selection committee to solicit donations from responding vendors during the selection process, except for donations or benefits expressly stated in the procurement document.

H. Prohibited Purchases

See Finance and Accounting Department's guidance on the appropriate use of funds: http://fa.ucf.edu/guidelines/Others/Funds_Use_Guidelines.pdf

I. Purchases for Individuals

The Procurement Services Department is not authorized to make purchases for any individual or organization not connected to the university.

J. Splitting of Orders

UCF policy states that deliberate attempts to split orders, where the purpose is to keep the total cost for each order below the bid limit is an evasion of the UCF procurement procedures and, therefore is unlawful. Orders should be consolidated/combined when practical, for the interest of economy.

This applies to multiple requisitions to the same vendor for the same or similar service or commodity originating from the same department (regardless of department number). The department will be given the option of:

1. Canceling the requisitions and create one requisition to cover the total purchase.
2. Allowing the Procurement Specialist to consolidate the requisitions into one purchase order.

Competitive quotes must be obtained by the department if the total for all consolidated requisitions exceeds \$10,000. Amounts in excess of \$75,000 will require competitive solicitation through procurement. Departments identified as splitting orders will be brought to the attention of the Procurement Services Director.

2. DEFINITIONS

Artistic Services- Services provided by an individual or group of individuals who profess and practice a skill in the area of music, dance, drama, folk art, creative writing, painting, sculpture, photography, graphic arts, web design, craft arts, industrial design, costume design, fashion design, motion pictures, television, radio or tape and sound recording or in any other related field.

Class B Printing- Shall be defined as that portion of printing (other than Class A Legislative Printing) which may be circulated to and/or used by the general public and government entities other than agencies of the State of Florida.

Commodity- Any of the various supplies, materials, goods, merchandise, food, equipment or other personal property, including a mobile home, trailer or other portable structure, which are purchased, leased, lease-purchased or otherwise contracted for by the university. "Commodity" also included interest on deferred-payment contracts entered into by the university for the purchase of other commodities. Printing of publications shall be considered a "commodity" when let upon contract either in accordance with Section 283.33, F.S., or in accordance with university guidelines. Software to be used pursuant to license agreements shall be considered a "commodity."

Competitive Bid/Proposal- The response submitted to an Invitation to Bid or Invitation to Negotiate by responsive and responsible bidders or proposers.

Competitive Solicitation- An Invitation to Bid, or an Invitation to Negotiate to select a competitive contractor.

Contractor/Vendor- A person or firm who contracts to sell commodities or contractual services to the university.

Contractual Services- The rendering by a contractor of its time and effort rather than the furnishing of specific commodities. The term only applies to those services rendered by individuals and firms who are independent contractors. This definition applies to individuals who are not performing the duties of an authorized position. “Contractual Services” does not include labor or materials for construction pursuant to Chapter 225, F.S.

Definite Quantity Contract- Contract whereby the contractor(s) agrees to furnish a specific quantity of items at a specified price and time. Delivery and acceptance of the specific quantity at the university of such place designated in the contract completes the contract.

Department- Any college, school, department, principal investigator, club, organization or other budget entity which has been assigned a funds account number by the university controller.

Direct Owner Purchase- The purchase of materials and/or equipment that was originally included in the construction cost breakdown but is now purchased directly by the university to save the tax dollars associated with those items.

Extension- An increase in the time allowed for the contract period.

F&A- Refers to the Finance & Accounting Department or one of their employees.

Independent Contractor- A person or firm who provides a service to the university, and does not have any employment or other relationship or connection with the university, except as provided in Section 112.313, F.S.

Informal Quote- A written or verbal quotation not requiring a public opening of such at a specific time or date. Written evidence of verbal quotations shall be included with each requisition for a particular purchase.

Invitation to Bid (ITB) - A written solicitation for competitive bids, advertised to the general public with a defined opening date. Specifications are clearly defined to the point that any interested company will be able to submit a bid for the exact item/service needed. This solicitation is generally required for acquisitions exceeding the established bid limit. Award is based on lowest priced bid.

Invitation to Negotiate (ITN) - A written solicitation, for goods or services, where factors other than price are to be considered in the award determination. These factors may include such items as vendor experience, project plan, design features of the product(s) offered, etc. ITN is used when the specifications cannot be identified; the end result is explained but we want qualified companies to offer their solutions for consideration.

Minority Business Enterprise (MBE) - A business concern as defined in Section 288.703(2), F.S. This classification includes but is not limited to small, minority-owned, woman-owned, disadvantaged and disabled business entities.

President- The chief executive officer of the university, responsible for its operation and administration.

Printing- The term “printing” shall include “commercial printing services” and shall mean and include any mechanical process whereby ink is transferred to paper, except internal photocopy reproduction. Printing shall include duplicating when used to produce publications and also the process of and the materials used in binding.

Public Entity Crime- A violation of any state or federal law by a person in the transaction of business with any public entity of any state or with the United States Government involving antitrust, fraud, theft, bribery, collusion, racketeering, conspiracy or material misrepresentation.

Purchase- An acquisition of commodities, services, or licenses obtained by purchase order or contract whether by rent, lease, installment, or outright purchase.

Procurement Activity- A university activity, delegated by the university president, to develop descriptions/specifications, to select and solicit sources, to prepare award of contracts for commodities and services, to perform post-award functions, and to administer contracts.

Procurement Officer- A person, delegated the authority by the university president, to enter into, administer, modify, or terminate contracts and make related determinations and findings. The term includes any authorized representatives of the Procurement Officer acting within the limits of their authority.

Renewal- Contracting with the same contractor for an additional period of time after the initial contract term, provided the original terms of the agreement specify an option to renew or the renewal is determined by UCF General Counsel to be in the best interest of the university.

Responsible Bidder- Bidder who has the capability in all respects to perform fully the contract requirements, and the experience, integrity, perseverance, reliability, capacity, facilities, equipment, and credit which will assure good.

Responsive Bidder- Bidder who has submitted a bid that conforms in all material respects to the solicitation.

Term or Annual Contracts- Indefinite Quantity Contract- The Procurement Services Department shall secure term or annual contracts whenever possible. The essential features of this type of contract are the establishment of a source(s) of supply, for a specified

commodity or group of related commodities, or services for stipulated prices and periods of time. The initial term and renewal periods are taken in to account when determining contract pricing. The specified period of time or date completes such contract. Contracts offer the economy of large-scale procurement, although requirements are spread over an extended period of time.

3. REQUISITIONS

The requisition process is used to request purchases of all commodities/services through the Procurement Services Department and is the most important document in the procurement cycle. It provides the information required to initiate the procurement transaction. Complete and correct preparation of the requisition expedites the procurement process.

A. Electronic Procurement System

The PeopleSoft Financial system includes a procurement module that is web-based. Departments can create, approve and budget check requisitions at their own location, which are then available for procuring, and F&A to source to purchase orders. Departments must have personnel properly trained through the financials training program to enter and approve requisitions. It is mandatory for approvers to be on the department or project Departmental Authorization List (DAL) managed by Finance & Accounting.

B. General Monetary Levels and Limits for Additional Approvals

1. Less than \$10,000: Quotes are not required. Competition is encouraged, and quotes from minority businesses are encouraged.
2. \$10,000.01-\$35,000: Two or more informal price quotes are required. At least (1) quote from a certified small, woman or minority vendor is encouraged. Quotes can be obtained by telephone and annotated on the Purchase Requisition in the comments field or attached to the Purchase Requisition. Document as much information on the commodity/service as possible from each vendor (make, model, prices, delivery info, discounts, etc.) to assist Procurement Services in properly comparing the quotes to determine the most reasonable cost.
3. \$35,000.01-\$75,000: Three formal written quotes or more from different companies are required. At least (1) quote from a certified small, woman or minority vendor is encouraged. Quotes must be on the companies' stationery/fax cover, etc., and signed by their authorized rep. Quotes must be attached to the Purchase Requisition.
4. \$75,000.01-Above: Require formal invitation to bid/invitation to negotiate. Small and minority businesses are included in the solicitation advertisements.
 - a. Procurement Services reserves the right to compete any purchase request regardless of dollar amount when it is determined that better pricing is available.

- b. Waiver of Competition: It is a money saver to obtain competition for all purchases. The Procurement Services Department can assist in obtaining quotes if a department's research falls short. As stated above, competition is required between \$10,000 and \$75,000, but the Procurement Services Department is aware that sometimes the required number of quotes is not possible. In those instances, The Procurement Services Department's management can waive the need for competition in the Request to Waive Additional Quotes if properly justified. The approved request to waive quotes must accompany the Purchase Requisition. Sole Source Certification forms are only required above \$75,000.01.
 - c. \$500,000: The president is authorized to contract for goods and services up to any dollar amount and he approves any purchase exceeding \$500,000. The Procurement Services Director has authority up to \$500,000 but authorized to approve acquisitions exceeding that amount from a procurement perspective, if already approved by the president.
- 5. \$20,000.00-Above: Information technology resources require an Information Resources Request (IRR) and approval of the vice provost for Information Technologies and Resources.
 - 6. University telecommunication services are administered by the Department of Computer Services and Telecommunications (CS&T). CS&T is the solely authorized provider of telecommunications services for the university. Telecommunications services include but are not limited to telephone, data network (Local Area Network), data circuits (Wide Area Network), cable TV, smartphone support, infrastructure cabling, Internet service, Internet2, Florida Lambda Rail, E911, Distributed Antenna Systems (DAS), and two-way radio communications. No communications systems or services may be interconnected with UCF communication systems or provided to the university as an enterprise solution without the prior approval of CS&T. For further information please refer to [Policy 4-003.1](#) Telecommunication services, supplies or equipment must be documented showing approval has been granted.

C. Procurement Services Card

- 1. General: The University operates its own Procurement Card program through an arrangement with a bank. This program is intended to streamline processes, improve management reporting and reduce the cost of making small purchases and official travel reimbursements.
- 2. UCF Structure: F&A is the issuing authority for the procurement card, and has a Procurement Card Administrator to manage the program. Departmental Managers select individuals in good standing to be cardholders. Contact the Procurement Card Administrator for further information.
- 3. All transactions under \$500 which are not prohibited (Section 1, Item H) must be on PCard. Contact the PCard Administrator for additional details at (407) 882-2235.

D. Procurement Cycle

1. The Procurement Cycle is an estimate of the time it takes Procurement Services to make a non-problematic procurement. User departments are encouraged to contact Procurement Services prior to preparing a requisition to secure the correct ordering information, source of supply, prices, terms, etc. Listed below is a schedule of approximate minimum processing times for the issuance of a purchaser order once the requisition has been approved for procurement action:
 - 1 Calendar day if non-bid/quote requirement
 - 1 Calendar day if only oral quotations are required
 - 1 Calendar day if informal written quotations are required
 - 30 Calendar days if formal bids are required
 - 60-90 Calendar days if informal Invitation to Negotiate is required
 - 5-10 Additional days if external level approval(s) is/are needed for any of the above.
2. Requisition Consolidation: Unless adequate justification to the contrary is furnished in writing, Procurement Services will consolidate all requisitions for similar items that can be purchased from the same type of vendor(s). Total price of the consolidated requisitions shall determine the level of competition required.

E. Requisitions Processing Procedures

1. The procedures set forth below outline the manner in which the requisition should be completed:
 - a. All requisitions must be approved by two individuals: the requester and an approver. The approver must be listed on the Departmental Authorization List (DAL) maintained by Finance & Accounting. It is not necessary for the requester to be listed on the DAL.
 - b. Procurement Services and F&A Specialists are in the workflow chain and will review requisitions to determine whether they are appropriate for sourcing into a purchase order. Requisitions not approved by the Procurement Specialist will be denied or placed on hold, with a system generated notification being sent to the requester.
 - c. Requisitions are the primary means of written communication between the departments and Procurement Services; therefore, the following helpful hints are provided:
 - i. Provide detailed information in the description.
 - ii. Use only common non-technical abbreviations.
 - iii. Annotate or attach required price quotes to the requisition.
 - iv. Requisitions should be submitted to Procurement Services sufficiently in advance of the need for the goods and/or services in order to permit adherence to normal procurement procedures.
 - v. Select accurate category codes. Account codes are linked to the categories and the correct code will populate to the

- requisition and therefore should not be changed.
- vi. Use the header comments of the requisition to provide any special instructions, such as warranties required, phased delivery dates, requests for departures from normal procurement procedures, special justifications, special terms or conditions to be included on the purchase order, etc.
 - vii. Create separate line items if there are more than one item and they are different.
 - viii. Select vendor under header defaults. If vendor is not in the system, e-mail procurement@ucf.edu with the following information: vendor name, phone number and fax number (e-mail and website are encouraged if known). A W-9 must be provided by the vendor. Vendors cannot be entered and utilized without the W-9.
 - ix. Use Standard Comments Department D001 on all requisitions under the header comment link to provide department contact information.
 - x. Departmental location information must be provided on distribution link from schedule tab.
 - xi. Ensure the delivery location. If it is other than receiving, put it under the one-time address link on the schedule tab. The one-time address link can be used only with prior approval from Procurement Services. Also include a statement in header comments. It is prohibited to have official orders shipped to an individual's personal address.
 - xii. Annotate "Change Order # to Purchase Order #" in the description if the requisition is a change order. Amount should be for the change only.
 - xiii. OOR approval is accomplished through workflow routing, Account codes 21028, 29, 30 and a few others require OOR approval.
 - xiv. Approvers should not make changes to the requisition without the requestor's knowledge. Requestors are to review the online purchase order to ensure changes were not made.
- 2 Expense vs. Equipment: For the purpose of this section, the definition of equipment is: equipment, fixtures and other tangible personal property of a non-consumable and non-expendable nature, the value or unit cost of which is \$5,000 or more, and the normal expected life is 1 year or more. Property assets also includes library resources that are circulated to students or the general public, such as books, journals, periodicals, audio/visual media, computer-based information, manuscripts, maps, documents and similar items, which provide information essential to the learning process or that enhance the quality of academic, professional, or research libraries. The threshold for library resources is \$250.

Accessories and components that are necessary to complete a set, kit, or system, may be included with the equipment item(s) as a part of the unit. The entire

purchase will then be coded as equipment expenditure. Finance & Accounting is the final authority for determination of Equipment vs. Expense and the most appropriate account code.

F. Price Determination

1. There are dollar thresholds which must be observed for competitive solicitations. This applies to purchases of commodities or services which may or may not require multiple year agreements or are to be purchased in phases. The total value of the contract shall be the purchase price for the initial term, plus all renewal costs. The Procurement Specialist shall determine the cost of all contemplated renewals when initiating the competitive solicitation.
 - a. The Procurement Specialist will obtain estimated annual costs from the user, research PeopleSoft or review previous contracts.
 - b. Whenever the sum of the anticipated contract's initial term and all renewals exceed the \$75,000 threshold, a formal solicitation is required through the Procurement Services department.
 - i. Example 1: Yearly cost for a particular service is \$26,000, and the user wants a three year agreement where the total aggregate cost is \$78,000- a formal solicitation is required.
 - ii. Example 2: Yearly cost for a particular service is \$18,000 and the user wants a four year agreement where the total aggregate cost is \$72,000- a formal solicitation is not required; 3 formal quotes are necessary.
 - iii. Example 3: Yearly cost for a particular service is \$70,000 and the user intends a single year agreement without any renewals- does not require a formal solicitation.
2. Departments may obtain cost estimates from catalogs, prior orders, or vendors. When securing vendor's estimates, requestors should be careful to avoid the impression that he or she is asking for an official bid or placing an order. Estimates or quotations in excess of \$75,000 will require guidance from the Procurement Services Department before obtaining additional estimates.
3. Upon receipt for the requisition, the Procurement Services Department will determine the method for obtaining the actual price upon receipt of the requisition.

G. Advance Payments

Advance payments are a common business practice and are required by suppliers for a variety of reasons. Examples of items and services that may require advance payments include:

1. Catering or service contracts
2. License agreements
3. Operating capital for a specialized piece of equipment

The following items/services are examples of items/services that are qualified for automatic prepayment approval:

1. A continuous need for the maintenance or service of a research project
2. A critical need to the mission of the department
3. Customized equipment or furnishings
4. Compliance with the payment terms of the vendor
5. Represented savings to the university
6. Other (justification provided by the requesting department)

Advanced payment invoices will be processed according to the following procedure.

Procedure Description Steps:

1. Invoices that are not for research projects and include payment terms requiring a payment prior to the requesting department receiving the requested goods and/or services, will be automatically approved for an advanced payment by Finance & Accounting (F&A), if the prepayment terms are documented on the invoice, or other agreement between the university and the payee. Finance & Accounting will review the prepayment during the vouchering process to ensure the payment meets the prepayment terms.

For research projects requesting an advance payment, F&A will consider the prepayment approved after review and approval by the Office of Research & Commercialization (ORC).

2. The disbursement staff processor is required to log the prepayment, if the payment meets both of the following criteria:
 - a. The prepayment is for a term of service, or for goods expected to be received after a fiscal year end in which the payment occurs.
 - b. The payment is for \$5,000 or more.
The log is an excel file titled "Advance Multi-Year Payments" located on the T-Drive and is available for review by General Accounting.

If you have any questions, please contact Joel Levenson at (407) 882-0235 or joel.levenson@ucf.edu.

H. Reimbursement for Expenses Other Than Travel

The reimbursement method is in place to reimburse UCF employees for small out-of-pocket expenses incurred as a result of the employee being in a situation that prevented them from submitting a purchase requisition to the Procurement Services Department (i.e., purchase of books, other printed materials or copies while attending an out of town meeting; meals incurred related to search committees; expressway tolls; etc.). The reimbursement method should not be used to make purchases that could be bought by the Procurement Services Department or PCard (computers, research supplies, routine office supplies, etc.).

UCF departments lose tens or thousands of dollars annually in tax payments due to UCF employees using personal funds to procure commodities and services, and then submitting a requisition for reimbursement. Note that purchases through official channels (Procurement Services Department or PCard) are tax exempt, while vendors charge taxes to employees by using personal funds to make official purchases.

UCF employees should not use their personal funds to procure commodities or services then seek reimbursement simply because they did not plan for the need or because they prefer to buy it after work hours without going through normal procurement procedures. PCard and requests through the Procurement Services Department are approved by expedited methods to fulfill requirements. Requisitions for reimbursement of other than travel expenses are routed directly to F&A to process.

I. Memberships

Membership payments shall be made via PCard and only as a last resort by submitting an online requisition to the Procurement Services Department. The responsibility for accurate and appropriate processing of the membership rests with the using department. Memberships shall be “institutional” naming the University of Central Florida as the member whenever possible. Individual memberships shall be procured only when the organization will not enter into an institutional membership. If the membership organization requires recurring payments, these may also be paid with the UCF Pcard as long as they are not set up as automatic payments. The originating department must renew and pay the membership annually, as needed. Contact PCard administration at F&A if you have any questions or need further assistance.

J. Magazine Subscriptions

Magazine subscriptions (new and renewals) shall be paid via PCard directly from the respective publisher. The responsibility for accurate and appropriate processing of the subscription and commensurate delivery rests with the using department. Each subscription must have an addressee name and physical location to be provided to the publishing company. Subscription renewals must be handled directly with the individual cardholder and not as an automatic renewal with the publisher.

K. Sam’s Club Membership

Departments who would like to make purchases at Sam’s Club should request a membership authorization letter from the Procurement Services Department. The department will take that letter to Sam’s Club Customer Service and be added to the university’s membership for an annual fee. Departments are responsible for payment of the annual fee.

Sam’s Club does not accept the Visa P Card. To make a purchase, the department must create a blanket PO under vendor # 4685 – Sam’s Club Direct, prior to shopping at the store. The Member will provide the PO number at the store to make the purchase. Be sure to save the receipt. The receipt becomes the voucher for payment. The approved receipt will be sent to Finance and Accounting for processing. If food is included in the purchase, the appropriate back up documentation must be provided (i.e., List of Attendees, a Flyer of the event or a detailed email explaining the event). When F&A gets the approval from the department then that receipt will be tied to the blanket PO.

4. PURCHASE ORDERS

A. Purchase Orders

The purchase order is the normal instrument by which goods and services are acquired. It is the vendor's authority to ship, and to invoice for the items, under the terms, and pricing specified on the order. The issuance of the purchase order on the basis of either formal or informal quotes initiates a contract by accepting the offer made by the vendor. It is a legal instrument and once accepted, establishes a mutuality of agreement. It has the legal force of a binding contract.

B. Confirming Orders

Departments are not authorized to place orders directly with vendors for goods or services, unless expressly approved by the Procurement Services Department. Orders placed with a vendor without prior approval subjects the person placing the order at risk for paying the vendor with personal funds.

All purchases shall be in compliance with the provisions of [UCF Regulation 7.130](#) and [UCF Policy 2-107.4](#), Signature Authority Policy. Departments may only place orders with a vendor after completion of the appropriate procurement process (dispatched PO, verbal notice to proceed from Procurement Services, PCard order, etc.). Also, contracts should not be signed until to all procurement actions are in place (competition, approved competition exemptions, approved justifications, etc.). Failure to do so, may subject departments or units to fines.

Penalties for non-compliance

1. First violation- written reminder to the head of the department or unit of the requirements of the policy.
2. Second violation- five hundred dollar fine assessed against the department or unit.
3. Third and subsequent violation- one thousand dollar fine assessed against the department or unit.
4. In addition to the above and concurrent with each violation, the individual signing without authority shall be subject to progressive discipline consistent with existing policy, up to and including termination.

C. Change Orders

1. A change order is required to:
 - a. Decrease or increase purchase order quantities or price;
 - b. Substitute comparable acceptable items for those on the original purchase order,
 - c. Make any substantial changes on a purchase order that will result in a cost differential, or;
 - d. Terminate the purchase order.

2. Departments initiate the requests for change orders with a requisition, noting on the requisition only the information changed. Purchase order reductions can be requested by e-mail to the liable Procurement agent.
3. Unless otherwise authorized by the PO or contract, change orders are not valid until the vendor has accepted the terms thereon.
4. Requests for change orders should not be submitted for the following transactions, since F&A will automatically process payments and/or adjustments for invoice amounts in these cases:
 - a. Where the invoice is not more than 20% for the item(s) or in any case no more than \$1,000.
 - b. When the total cost shown on an invoice is less than the purchase order cost.
 - c. Freight bill costs when FOB block of purchase order indicated freight is to be prepaid and added to the invoice.

D. Blanket Orders

1. Blanket order is a simplified method of filling urgent needs for small quantities of supplies or services by establishing open accounts with qualified vendors. Blanket orders are designed to expedite the acquisition of urgently needed supplies or services and to reduce administrative cost in accomplishing small purchases by eliminating the need for issuing individual purchase orders over the course of a fiscal year. Blanket orders are only good for the fiscal year in which they are issued. New requisitions for a blanket PO must be submitted annually to continue an existing contract's expenditures. Normally a listing of the authorized items and the prices are indicated on the face or attached to the order. Blanket orders fall into two general categories as follows:
 - a. Blanket Purchase Order: Authorizes the purchase and delivery of small dollar valued commodities and services as requested by the issuing department. This order cannot exceed \$75,000 unless pricing is based on an existing bid or contract. Competitive quoting limits apply to blankets.
 - b. Blanket Maintenance Order: Authorizes the vendor to provide maintenance services in accordance with an approved agreement. Advance payments must be in accordance with an approved agreement. In lieu of advance payments, it is recommended that charges be broken into monthly or quarterly payments to facilitate the payment process and to ensure UCF receives the quality of service required before paying a vendor.
2. Limitation on Use: Blanket orders may not be used for the purchase of tagable/asset items, or prohibited purchases.
3. Funds Increase/Decrease: The encumbrance of a blanket may be increased or decreased by submitting a change order requisition (request purchase order reductions by e-mail).
4. Termination of Order: The order may be terminated by submitting an e-mail to the Procurement Services Department. The order may be terminated by the Procurement Services Department for misuse or failure to follow established

policies or procedures.

5. INVITATION TO BID/INVITATION TO NEGOTIATE

A. Invitation to Bid (ITB)

1. Purchases totaling \$75,000.01 or more for services, commodities, deferred payment contracts, or a group of items shall be made by first attempting to secure two or more formal competitive bids or proposals. The requesting department shall develop specifications with the assistance of the Procurement Services Department, that maximizes full and open competition and obtain the most advantageous contract pricing. Vendors assisting in project design or preparation of specs cannot participate in the bid process.
2. In addition to the specifications for the commodities/services to be purchased, the bid invitation shall contain all applicable terms and conditions prescribed by statutes/rules.
3. The Procurement Services Department shall advertise any formal invitation to bid or invitation to negotiate in a newspaper of general circulation, or the State of Florida Vendor Bid System on the Florida Communities Network Website, when such public notice is deemed to be in the best interest of the university and consistent with the proposed purchase.
4. When two or more bids or proposals are received, the award shall be made to the lowest responsive and responsible bidder meeting the specifications of the ITB or proposal offering the best value to UCF.
5. When only one formal bid or proposal is received, the Procurement Services Department shall review the ITB/ITN and resultant bid/proposal to determine the reasons, if any, why only one response was received. Award can be made to the one bidder if the Procurement Director or designee determines that the received bid is fair and reasonable and a second call for bids/proposals would not be in the best interest of the university. Additional bids/proposals may be solicited if it is determined that a second call for bids/proposals may produce better competition or would be in the best interest of the university.
6. In the event that no bids are received, the Procurement Director shall either rebid the requirement or negotiate the purchase at the best possible price, from a source determined by the Procurement Services Department to be in the best interest of the university.
7. No purchase shall be divided or subdivided in order to circumvent the formal competitive bidding requirements.
8. The university shall reserve the right to reject any and all bids or proposals, and such reservation shall be indicated in all advertisements and specifications.

B. Invitation to Negotiate (ITN)

In the case where an ITB is not feasible and will not result in the best value to the university, the Procurement Services Department may determine that an ITN is the proper competitive solicitation process to obtain the required commodities or services.

This method is used when the university has a need for commodities or services but does not or cannot provide adequate specifications, leaving it to the vendors to propose their best solution of satisfying the requirements. Examples of previous invitations to negotiate include the Bookstore, Food Service, Beverage Contract, ERP Consulting Services, Consulting Services for Sponsorship and Naming Rights of University Assets. These contracts provided innovative and imaginative offers from vendors who proposed methods of handling our needs in these areas. The awarded proposal is not based on price alone, but the vendor's qualifications, the quality of the offer to provide the best value and whether it is in the university's best interest.

After the ITN responses are received, the Procurement representative reviews the responses for compliance. The responses are then distributed to the evaluation committee members. Because of the nature of ITNs where awards are usually heavily based on subjective evaluations by an assigned advisory committee, special procedures must be followed to ensure fairness and compliance with legal requirements. Advisory committees will consist of at least three (3) individuals who have expertise or some experience with the subject matter of the ITN, or who could be characterized as recipients, beneficiaries, or users of the ITN's subject matter. Each evaluation committee member shall function independently of the other members, and throughout the entire evaluation process, each evaluation committee member is strictly prohibited from meeting with or otherwise discussing the ITN and any aspect thereof including, without limitation, the proposals and their content with any other individual whatsoever, unless specifically asked for input by the final decision maker. After thoroughly reading and reviewing the ITN, each evaluation committee member conducts independent evaluations of the proposals in accordance with evaluation criteria set forth by the ITN. Completed evaluations are submitted to the liable Procurement official, who will then submit copies of these evaluations to the final decision maker (normally a Vice President or Dean). This decision maker will take the evaluations into consideration (although not bound by them) in making the recommendation for final award or rejection of all proposals if this is in the best interest of the university. This recommendation will be forwarded to the Procurement Services Department for final review and award.

In addition to the foregoing procedures, no negotiations, decisions, or actions shall be initiated or executed by any proposer as a result of any discussion with any UCF employee. Only those communications that are in writing from the authorized UCF Procurement representative identified in the ITN on their designee shall be considered as a duly authorized expression on behalf of UCF. Only communications from the proposer that are signed and in writing will be recognized by UCF as duly authorized expressions of the proposer.

Special workshops upon request will be conducted to instruct potential evaluation committee members on the complexity of ITN procedures and the basis for following them precisely during the evaluation process.

6. EXEMPTED PURCHASES

A. Exceptional Purchases

Purchases of commodities and contractual services in excess of \$75,000 must be made on the basis of competitive solicitations with certain exceptions. Some exceptions/exemptions are described in this section and others can be viewed on the [Procurement Services website](#) and [UCF Reg 7.130](#) Administration and Finance; Procurement Services.

B. Sole Source Purchases

1. Definition: Commodities, contractual and constructional services exceeding \$75,000 available only from a single source.

When competition is not possible, and a UCF department must use a specific vendor, a sole source exemption may be granted. A sole source will only be approved if the item/service is unique to only one particular vendor, it cannot be obtained from another supplier, and the item/service is the only item/service that satisfies the department's needs. Few sole source exemptions are granted each year; therefore, departments are strongly cautioned NOT TO ASSUME that a sole source will be granted, even if the Procurement Services Department has approved a sole source exemption in the past. Examples of circumstances that do not justify sole source procurement:

- a. A manufacturer has many distributors, but the department prefers to only buy from a particular distributor.
- b. A supplier's capability to deliver in the least amount of time (under a non-emergency situation).
- c. Specialized equipment that a UCF department claims can only be provided by one vendor but there has been inadequate research to show how the department knows that there are no others that can provide the equipment.
- d. A consultant worked on a small project and the department now seeks to hire the consultant's company as the only source on a more comprehensive project because the consultant "already knows the inner workings of the university/department and it would not be cost effective to use a different consultant."
- e. Stating a consultant is the foremost authority on the subject without explaining how that particular level of expertise is required for the project.

When departments require a specific brand of item, the department must advise the Procurement Specialist thereof and the two will work together to determine if a "no substitute products accepted" provision should be inserted into a competitive solicitation. A "no substitute products accepted" provision is not the same as a "sole source." In many instances, it is quicker to issue a competitive solicitation than to document a sole source.

The sole source process is not a quick process; it requires extensive written justification from the department, which must include an explanation to show that the university is receiving a fair and reasonable price, and extensive research by the Procurement Specialist to verify that the commodity/service is actually a true sole source.

Price explanation may be accomplished in various ways, including comparison of the price quoted against a similar or inferior item that does not meet specifications, similar items in a catalog, recent purchases, etc. Often those prices can be obtained when the department is conducting research to determine additional sources of supply. Negotiations with the vendor are highly recommended in order to obtain the best value for the university.

2. Process for Sole Source Approval:
 - a. Complete the [Sole Source Certification](#) form. Justifications must be clear and detailed and must provide complete answers for **each** point listed in Part II of the Sole Source Certificate to allow for evaluation and determination of the validity of the sole source. Justifications with inadequate detail or incomplete answers will be denied and the desired purchase will be submitted for open competition. The purchase requisition can be entered into the PeopleSoft financial system at any point in the sole source process; however, doing so does not ensure approval of the sole source.
 - b. The completed sole source form must be approved in the following order:
 - i. UCF Department Director or Chair
 - ii. UCF College President, Division Vice President, Dean or Designee
 - iii. UCF Procurement Director, who will review and provide a recommendation to approve or disapprove the sole source to:
 - iv. Vice President for Administration and Finance Chief Financial Officer, who will either directly approve or disapprove the sole source; or, in some cases involve academic departments, forward it to the Provost for input prior to making the final decision to approve/disapprove the sole source.
 - c. Contingent upon the approval of all the offices/individuals listed under paragraph (B) above, the sole source will be posted on the Procurement Services Department's bulletin board for seventy-two (72) business hours. Upon expiration of said posting period, the Procurement Services Department will order a purchase order.
 - i. Purchase orders issued using the Sole Source Certification may not be subsequently increased by change orders in amounts exceeding the bid limit without recertification from the initiating VP/Dean. E-mail approvals are accepted.
 - ii. Duration of a Sole Source Certification cannot exceed twelve (12) months unless the original sole source specifically identified a longer term. Departments must process a new sole source request upon expiration of the original certificate.

- iii. Change orders are permitted only if the added goods or services are rendered within the original twelve (12) month sole source term. If the services being added exceed the original twelve (12) month term, and the amount exceeds \$75,000, a new sole source form will be required.

C. Waiver of Competition

Definition: Commodities, contractual and construction services between \$10,000.01 and \$75,000 available only from a single source. Acquisitions between \$10,000.01 and \$35,000 must have informal quotes from two (2) vendors. Acquisitions between \$35,000.01 and \$75,000 must have formal quotes from three (3) different vendors. When competition is not possible, and the department must use a specific vendor, and the cost of the acquisition is between \$10,000.01 and \$75,000 the Procurement Director may grant a waiver of competition, if all the requirements for this waiver have been met by the requester.

Few competition waivers are granted each year; therefore, departments are strongly cautioned NOT TO ASSUME that a competition waiver will be granted, even if the Procurement Services Department has approved a competition waiver in the past. Departments should not give a vendor a notice to proceed until the waiver is approved and a purchase order is created. Examples of circumstances which do not justify a waiver of competition are the same examples as set forth above under Sole Source Purchase.

Requests for a waiver of competition must be justified and routed for approvals as instructed on the [Waiver of Competition](#) form.

D. Annual Certification of Purchases

The Vice President for Administration and Finance approves an annual certification of non-competitive purchases based on the recommendation of the Procurement Director. These are commodities and/or services purchased on a regular and continuing basis that have proven to be non-competitive and available from a single source. The [certification](#) is updated at the beginning of each fiscal year.

E. Emergency Purchase

1. When the president or designee determines in writing, that a condition exists that threatens the health or safety of person(s), or animal(s) or the preservation or protection of property or the continuance of a vital university function, the university may proceed with an emergency purchase without a competitive solicitation. The emergency purchase shall be limited to the purchase of only the type of items and quantities or for a time period sufficient to meet the immediate threat and shall not be used to meet long-term requirements.
2. An emergency purchase shall be made with such competition as is practical under the circumstance. A written certification, signed by the president or designee: the Vice President for Administration and Finance and Chief Financial

Officer, outlining the basis for the emergency and selection of the source shall become a part of the contract file. When the situation concerns Academia, the Provost's concurrence is required prior to the president or designee's approval.

3. Procedure for Processing an Emergency Purchase: The Procurement Services Department (Facilities and Safety Department when the emergency concerns construction, real property, etc.) after determining that a true emergency exists, obtains verbal approval from the president or his designee (and provost when situations concern Academia). A verbal notice to proceed may be issued to the vendor at that time. After the emergency has been properly resolved, the requesting department will prepare an [Emergency Purchase Certification Form](#) (this form may be completed prior to the notice to proceed when time permits) detailing and justifying the emergency acquisition, and obtain the required signatures. The requesting department shall then submit a requisition with the certification attached. The Procurement Services Department will prepare and issue the confirming purchase order upon receipt of the requisition and certification.

F. Sponsored Research Exemption

1. General: Purchases for Sponsored Research projects are handled in accordance with Section 1004.22(7), F.S. which states the following: "All purchases of a division of sponsored research shall be made in accordance with the policies and procedures of the university; however, upon certification addressed to the university president that it is necessary for the efficient or expeditious prosecution of a research project, the president may exempt the purchase of material, supplies, equipment, or services for research purposes from the general purchasing requirement of the Florida Statute."
2. Procedure: Whenever a proposed purchase from contract or grant funds exceeds \$75,000 and conditions exist that support a non-competitive purchase, the department or researcher outlining the conditions and circumstance for requesting a Sponsored Research Exemption should send a memorandum to the Office of Research and Commercialization. The Vice President for Research and/or his authorized representative will determine if the exemption request is appropriate, and if so, prepare a certification memorandum to the president. The certification memorandum shall be posted on the Procurement Services Department's bulletin board for seventy-two (72) business hours. The Procurement Services Department will issue the purchase order upon expiration of said posting period and receipt of a requisition with an attached copy of the memo sent to the president (does not need the memo showing the president's approval). Sponsored Research Exemptions shall be used in lieu of a sole source if it is authorized under F.S. 1004.22(7).

7. PRINTING

A. Acquisition of Printing

Printing shall be purchased in accordance with the requirements of these rules. The university may refer to the requirements of Chapter 283, F.S., and rules promulgated thereto for guidance with respect to the purchase of printing services.

1. Printing: The term “printing” shall include “commercial printing services” and shall mean and include any mechanical process whereby ink is transferred to paper, except internal photocopy reproduction. Printing shall include duplicating when used to produce publications and also the process of and the materials used in binding.
2. Class B Printing: Shall be defined as that portion of printing (other than Class A Legislative Printing) which may be circulated to and/or used by the general public and public or governmental entities other than agencies of the State of Florida.

B. Printing Policies and Procedures

[UCF Policy 3.302](#) governs all requests for Printing Services.

All UCF departments are required to forward their print jobs to UCF Printing Services (even if the printing will be paid by PCard). If Printing Services cannot fulfill the project, that department will then receive price quotes from printers on the approved vendor list whose equipment, production availability, delivery capability and printing expertise best match the needs of the UCF client. In addition, UCF Printing Services will review the printing specifications for the project and act as the unit’s liaison with the preferred printers to assure that all conditions of the contract are met.

If, after receiving price quotes from Printing Services, an academic or administrative unit chooses to use a printer other than Printing Services or one of the approved printing companies, a written explanation must be forwarded to Printing Services requesting a one-time waiver prior to contacting the non-contract vendor(s). Note that if problems arise concerning quality, delivery, service or other factors related to a job printed by a vendor not on the list, the unit may be responsible for finding a solution at its own expense. If the pieces printed do not meet graphic standards, they may be pulled from distribution and may have to be reprinted.

In addition to the above mentioned benefits, a major advantage is that departments utilizing the contract vendors need not concern themselves with obtaining competitive bids. Printing Services will facilitate competition among contract vendors so that units receive the best price and delivery. There will never be a need for a formal bid, thereby saving the department valuable time and resources. Competition guidelines must be adhered to when not using the contracted vendors: \$10,000.01-\$35,000 must have two written quotes; \$35,000.01-\$75,000 must have three quotes and orders totaling \$75,000.01 and above will be formally processed as a bid by Procurement Services.

C. Recycled Paper

Recycled paper shall be purchased when economical and if and when recycled paper can be obtained that is of adequate quality for the purposes of the printing work

considered. In awarding a contract, up to a 10 percent price preference may be allowed to a responsive bidder who has certified that the materials used in printing contain at least the minimum percentage of recycled content established by the printing specifications. If no bidders offer materials for printing that contain the minimum prescribed recycled content, the contract shall be awarded to the lowest qualified bidder.

D. Preference to In-State

Preference shall be given to bidders located within the state when awarding contracts for printing when such printing can be done at no greater expense than, and at a level of quality comparable to, that obtainable from a bidder located outside of the state. When awarding a contract to have materials printed, the university must grant a preference to the lowest responsible and responsive bidder having a principle place of business within the State of Florida. The preference shall be 5% if the lowest bid is submitted by a vendor whose principle place of business is located outside the state and if the printing can be performed by the Florida bidder at a level of quality comparable to that obtainable from the bidder submitting the lowest bid located outside of Florida. See BOG regulation 18.001 for further details.

8. OTHER SPECIAL PROCEDURES

A. Leases: Installment-Sales Acquisitions of Equipment

1. Leases: Leases of equipment are subject to bidding requirements, if over \$75,000 annually. All leases shall contain a cancellation clause, availability of funds clause, and a stipulated lease period. Leases may contain a lease renewal option, if appropriate.
2. Processing Procedures: The following information together with a copy of the proposed contractual agreement must be submitted with the purchase requisition to the Procurement Services Department:
 - a. Name of agency/department requesting approval;
 - b. The proposed contractual agreement or requisition indicating the terms of the acquisition, including a description of the equipment (make, model, number of units);
 - c. Department or project number from which the payment for the lease will be made;
 - d. Method by which the vendor was selected (State contract, sealed competitive bids, negotiation, or other specified method);
 - e. Appropriate documentation of compliance with other applicable law, if any;
 - f. Were funds specifically appropriated to purchase or replace this equipment;
 - g. If acquisition is to be made by lease or lease purchase method:
 - i. Provide outright purchase price of specific piece of equipment, taking into consideration accruals, if applicable;
 - ii. Indicate expected period of need for piece of equipment,

- notwithstanding the terms of the proposed lease;
- iii. Indicate balance of expected useful life of the piece of Equipment;
 - iv. Provide cost of maintenance of equipment and whether or not maintenance costs are included in the lease payments; and
 - h. A specific explanation of why your department believes that this acquisition is economically prudent and cost effective.
- The above information will be used in performing a lease versus purchase analysis by Finance and Accounting.
3. Copying Equipment: If the equipment is to be acquired by a lease, lease purchase, or installment purchase is a copier, Business Services (BS) must approve the purchase. Upon BS approval the following must be provided to the Procurement Services Department:
 - a. The last six (6) months invoices showing copier usage indicated by meter readings;
 - b. A computation of the average monthly usage rate based on the invoices provided; or, if a new installation, an estimate of the expected usage rate per month.
 4. Deferred Payment Contracts: Interest on deferred payment contracts is defined as a commodity and these contracts are subject to the bid requirements if the total interest exceeds \$75,000. Deferred payment contracts meeting the following criteria require justification to demonstrate that the acquisition is economically prudent:
 - a. The deferred payment contract price exceeds \$75,000 annually; and/or,
 - b. The term of the contract is greater than 5 years.

The State Comptroller has established a Consolidated Equipment Financing Program (CEFP) through which the university may finance equipment exceeding \$75,000. Deferred payment commodity acquisitions not financed under the CEFP must be bid when the total cost exceeds \$75,000.

Installment sales acquisitions denied for enrollment in the CEFP but approved for financing shall be bid and processed in accordance with standard procurement procedures. Procurement Services will process the order for financing and notify the vendor supplying the equipment. After receipt of the equipment and acceptable installation, the department shall submit the Receipt Certificate to the Procurement Services Department for further processing.

B. Leases: Real Property

UCF 7.201, Real Property, contains the authority and the procedures to be followed by the university when executing leases for real property. The Procurement Services Department should be contacted when planning to lease any amount of space off campus.

C. Contracts: Annual or Term

1. General: Term or annual contracts are indefinite quantity contracts whereby a contractor agrees to finish an item or items at a specified price, during a prescribed period of time (such as three, six, nine or twelve months, or a specified date). The specified period of time or date completes the contract.
2. Multi-term Contracts:
 - a. Specified Period: A contract for supplies or services may be entered into for any period of time deemed to be in the best interest of the university provided that the terms of the contract and conditions of renewal or extension, if any, are included in the solicitations and funds are available to make purchases. Payment and performance obligations for the succeeding fiscal periods shall be subject to the appropriation of funds.
 - b. Determination Prior to Use: Prior to the use of a multi-term bid/proposal, it shall be determined that:
 - i. Estimated requirements during the effective period of the bid/proposal are reasonably firm and continuing; and,
 - ii. The bid/proposal will serve the best interest of the university by encouraging effective competition or otherwise promoting economies in university procurement.
 - c. Cancellation Due to Unavailability of Funds in Succeeding Fiscal Periods: When funds are not appropriated or otherwise made available to support continuation of performance in a subsequent fiscal period, the outstanding orders shall be paid only for supplies or services already received under the contract. A clause to this effect should be included in the contract.
3. University Annual Contracts:
 - a. The Procurement Services Department may establish annual contracts if purchases of a recurring nature indicate that an annual contract would be advantageous. Information as to specifications and estimated annual usage shall be coordinated with using departments. Blanket Purchase Agreement and Blanket Maintenance Agreement purchase orders may be used to consummate purchases against these contracts.
 - b. The university currently has a large number of commodities and services on annual contracts. Some examples are: office supplies, PeopleSoft consulting, radio and equipment service, OIR Multimedia equipment and supplies. Contact the Procurement Services Department for a complete listing of current UCF annual contracts or visit the [Procurement Services Department](#) website.
4. State of Florida Contracts:
 - a. The university may acquire any commodity which is available on any contract or price agreement executed by the State Division of Purchasing when such purchase is most advantageous to the university, with price, quality, performance and other factors considered. All state contract purchases by the university are exempt from competitive bid requirements.
 - b. A list of State Contracts can be obtained [here](#).
5. Cooperative Purchasing Contracts: The University may participate in or administer definite quantity or term contracts for the acquisition of any

commodity or service with one or more members of the State University System the Federal Government, another state, a political subdivision, or any independent college or university, and educational cooperatives and educational consortiums without further competition. Contact the Procurement Services Department for information regarding these contracts.

6. Uniform Administrative Requirements for Grants and Agreements: Recipients of awarded grants, contracts, and agreements are required to follow established and uniform administrative requirements as it pertains to the purchase of federal property. The Federal Office of Management and Budget's (OMB) Circular A-110 lists required components related to procurement standards of federal property. This circular sets forth standards for obtaining consistency and uniformity among federal agencies in the administration of grants and agreements with institutions of higher education, hospitals, and other non-profit organizations. The [White House Office of Management and Budget's website](#) addresses these procurement standards and will be useful in our administration of federal funds.

D. Contractual Services

1. Special Procedures Required: Purchases of contractual services exceeding \$75,000 may be evidenced by two-party contracts containing the following provisions:
 - a. Invoices are submitted in detail sufficient for audit review.
 - b. Invoices for any travel resulting from the contractual agreement are submitted in accordance with rates not to exceed the amount prescribed in Section 112.061, F.S.
 - c. The contract shall be subject to unilateral cancelation by the university if the contractor refuses to allow public access to all documents associated with the contract which are subject to the provisions of Chapter 119, F.S.
 - d. Units of deliverables must be specified in the contract, which shall include reports, findings, drafts, etc. that are to be received prior to payment.
 - e. The date for substantial (if applicable) and final completion of the contract.
 - f. A renewal clause, if the bid specifications for acquisitions contained this provision. The agreement may include price provisions if provided for in the original bid or proposal. No renewal period may exceed 5 years or twice the term of the initial contract, whichever is longer. Contracts may be renewed in accordance with the contract terms with the mutual consent of both parties. If the commodity or contractual service is purchased as a result of a competitive solicitation, the cost of any contemplated renewal must be included in the competitive solicitation. All contract renewals are subject to sufficient annual appropriations.
 - g. One twelve-month extension may be exercised, if required. The extension shall be in writing, signed by both parties, and shall be subject to the same terms and conditions set forth in the initial contract.

- h. Upon award of invitations to bid or invitations to negotiate, a contractual service agreement (UCF's standard for vendors) should be completed if practical, feasible, and approved by the General Counsel and other university authorized signatory (see [UCF Policy 2-107.4](#)) prior to the rendering of any services/commodities by the contractor.

E. Personal Service

1. General: This procedure is for the acquisition of contractual services when there is no commodity involved. Examples of such services are as follows: artistic, consultants, honorariums, lecturers, models, and professional services (physicians, architects, engineers, attorneys, court reporters, etc.)
2. Preparation and Submission: The following instructions must be followed in order for processing to occur:
 - a. Prior to submission of the requisition to the Procurement Services Department, the department requiring the services shall verify with the Human Resources Payroll section that the individual is an independent contractor and is not an employee of the university or the State of Florida and that he/she is not currently on the UCF payroll.
 - b. A requisition needs to be completed and sent to the Procurement Services Department no later than the date services are to begin. A vendor ID must be set up in the PeopleSoft system (if it does not already exist) before the requisition can be prepared. If it is a company with a federal ID number, submit to the Procurement Services Department for vendor set-up. If it is an individual with a social security number, submit to F&A for vendor set-up.
 - c. It is also important that the department requiring the services indicate on the requisition whether the individual is a U.S. Citizen. If the individual is not a U.S. Citizen, the department must contact F&A for further instructions.
 - d. In addition to the above information, the requisition must also include a description of the requested services the vendor will provide, the cost and the beginning and ending dates of the service. Competition requirements must also be adhered to.
3. Partial Payments: In the event partial payments are involved, it must be indicated in the description block of the requisition. After such work is completed, the independent contractor must submit a signed invoice for the partial payment.
4. Final Payments: After the work is completed, the department shall secure the payees and the authorized official's signatures on the final invoice and submit to F&A for payment processing.

5. Limitations on Use: This procedure is not to be used for adjunct professors or long-term services which tend to establish an employer-employee relationship between the university and the contractor.

F. Motor Vehicles, Watercraft or Aircraft

The university shall follow the state and federal guidelines of the Alternative Fuel Provider Program for the purchase of motor vehicles.

1. Definitions: For the purpose of clarity and uniformity the following terms shall have the meanings indicated:
 - a. ATV: any motorized off-highway or all-terrain vehicle 50 inches or less in width, having a dry weight of 1,200 pounds or less, designed to travel on three (3) or more highway tires, having a seat designed to be straddled by the operator and handlebars for steering control and intended for use by a single operator with no passengers.
 - b. Two-rider ATV: any ATV that is specifically designed by the manufacturer for a single operator and one passenger.
 - c. Off-highway Vehicle: any ATV, two-rider ATV, motorized recreational off-highway vehicle (ROV), or any off-highway motorcycle (OHM) that is used off the roads or highways and is NOT registered and licensed for highway use.
 - d. Off-highway Motorcycle: any motor vehicle used off the roads or highways that has a saddle or seat for the use of the rider and is designed to travel with not more than two wheels in contact with the ground, but excludes a tractor or moped.
 - e. Recreational Off-highway Vehicle (ROV): any motorized off-highway vehicle 64 inches or less in width having a dry weight of 2,000 pounds or less, designed to travel on four or more non-highway tires, having non-straddle seating and a steering wheel, and manufactured for recreational use by one or more persons. "ROV" does not include golf carts.
 - f. Watercraft/Vessels: any boats, canoes, pontoons, kayaks, waterski, jet ski, or any other vehicles used in the water for transport or transportation.
2. Approval: All acquisitions of motor vehicles, watercraft or aircraft through purchase, lease, lease purchase or transfer from another agency requires prior written approval of the Vice President for Administration and Finance and Chief Financial Officer via the [Motor Vehicle, Watercraft & Aircraft Request Form](#). Vehicle trade-ins require approval from the Surplus Property Board. The approval sheet shall be submitted with the purchase requisition.
3. Types of Equipment: Examples of equipment coming under this area are as

follows: automobiles, trucks, jeeps, buses; all types of tractors; utility vehicles, gas or electric, two, three or four wheel, all-terrain vehicles, electric golf carts, motorcycles, forklifts, street sweepers, motor graders, draglines, cranes, compaction and roller equipment; wheel and crawler loaders; refuse collection vehicles; all types of trailers, including utility, lowboy, flatbed, van, tank, boat, etc.; mobile homes and offices; PTO operated mowers; all types of watercraft, including boats, motors, canoes, air boats, etc.; and all types of aircraft.

4. Procedures for Vehicles:
 - a. Complete the Acquisition of Motor Vehicles, Watercraft or Aircraft Request Form. Reference the State Contract number or attach a detailed specification sheet, including any optional equipment needed.
 - b. Submit the completed form to Vice President of Administration and Finance and Chief Financial Officer for approval.
 - c. Submit Flex Fuel exemptions form if procuring a non-flex fuel vehicle.
 - d. Submit Surplus Property board approval sheet, if there is a trade-in.
 - e. Complete a requisition in the PeopleSoft Financial system and attach all required approved/signed forms.
5. Trade-in for any Vehicle:
 - a. Any type of motor vehicle, trailer, ATV, watercraft or aircraft must be approved for trade-in by the Surplus Property Board.
6. Procedures for Tags, Titles and Registration of New or Used Vehicles:
 - a. Vehicles Purchased in Florida: the dealer must prepare all paperwork for title, registration and tag (YELLOW STATE PERMANENT).
 - i. The dealer (or department if received in error) must send all paperwork concerning title, registration and tag to the Procurement Services Department. ALL TITLES AND REGISTRATIONS MUST USE THE ADDRESS OF THE PROCUREMENT SERVICES DEPARTMENT.
 - b. Vehicles Purchased Out of State: the dealer must forward all paperwork concerning title, registration and tag to the Procurement Services Department.
 - i. The Procurement Services Department will obtain the title, registration and tag from the Department of Motor Vehicles (DMV). The department will be notified of this cost and will create a journal transfer to the Procurement Services Department account. Once the transfer is completed, the department will be able to pick up a copy of the title, registration and license plate.
7. Leasing a Vehicle:
 - a. Leases of vehicles are subject to competition requirements. All leases shall contain a cancellation clause and a stipulated lease period. Leases may contain a lease renewal option.
 - b. Processing Procedures: The following information together with a copy of the proposed contractual agreement must be submitted with the purchase requisition:
 - i. Name of agency/department requesting approval.
 - ii. The proposed contractual agreement or requisition indicating the terms of the acquisition, including a description of the

- equipment (make/model/number of units).
- iii. Department or project number from which the payment for the lease will be made.
- iv. Method by which the vendor was selected (State Contract, sealed competitive bids, negotiation, or other specified method).
- v. If acquisition is to be made by lease or lease purchase method.
- vi. Provide outright purchase price of specific piece of equipment, taking into consideration accruals.
- vii. Indicate balance of the expected useful life of the piece of equipment.
- viii. Provide cost of maintenance of equipment and whether or not maintenance costs are included in the lease payments.
- ix. A specific explanation of why your department believes that this acquisition is economically prudent and cost-effective.

The above information will be used in performing a lease versus purchase analysis by Finance and Accounting.

8. Procedures for Vehicles Donated or Transferred: The university must be in compliance with Section 320.0609(2) F.S. the Notification of Transfer of Registration License Plate.
 - a. The donator must sign the title over to UCF, not to an individual.
 - b. Donator must prepare a letter describing the vehicle and mileage.
 - c. The department then must send the donator's letter to the Procurement Services Department.
 - d. The Procurement Services Department will obtain the title, registration and license plate then notify the department of the cost for the DMV. The department will then create a journal transfer to the Procurement Services Department account. Once the transfer is complete, the department will be able to pick-up a copy of the title, registration and a new license plate.
9. Procedures for Lost, Stolen or Damaged Tags:
 - a. The department is to notify the Procurement Services Department with the tag number, vehicle identification number (VIN), the name of their department and if the tag is lost, stolen, or damaged.
 - b. The Procurement Services Department will obtain the replacement tag using their PCard then notify the department of the cost obtained from the DMV. The department will then create a journal transfer to the Procurement Services Department account. Once the transfer is complete, the department will be able to pick-up the new license plate.
10. Procedures for Club Cars: The university only allows electric club cars on campus (vehicles that travel under 35 MPH).
 - a. Complete the Acquisition of Motor Vehicles, Watercraft or Aircraft Request form. Reference the contract number or attach a detailed specification sheet, including any optional equipment needed.
 - b. Submit the form to Parking Services for approval of a parking location.
 - c. Submit the form with Parking Services approval to the Vice President of Administration and Finance and Chief Financial Officer for approval.

- d. Complete a requisition in the PeopleSoft Financial system.
- e. When the club car is purchased in Florida, the dealer must prepare all paperwork for title, registration and tag.
 - i. The dealer (or department if received in error) must send all paperwork concerning title, registration and tag to the Procurement Services Department.
 - ii. Procurement Services will notify the department of the cost obtained from the DMV. The department will then create a journal transfer to the Procurement Services Department account. Once the transfer is completed, the department will be able to pick-up the copy of the title, registration and new license plate.

Gasoline powered club/golf cars/carts are prohibited on all UCF campus properties.

- 11. Procedures for Aircraft Acquisitions: The Request for Use of Rental Aircraft form, which is to be completed by the employee desiring to rent an aircraft. The completed form should be submitted to the Procurement Services Department at least ten days prior to the flight date. Appropriate levels of insurance are required and must be evidenced by a Certificate of Insurance prior to submitting the request to the Vice President for Administration and Finance’s approval.
 - a. A Request for Use of Rental Aircraft form is to be completed by the employee desiring to rent an aircraft.
 - b. The completed form should be submitted to the Procurement Services Department at least ten days prior to the flight date.
 - c. Appropriate levels of insurance are required and must be evidenced by a Certificate of Insurance prior to submitting the request to the Vice President of Administration and Finance’s approval.
- 12. Procedure for a Watercraft/Vessel:
 - a. Complete the Acquisition of Motor Vehicles, Watercraft or Aircraft Request form. Reference the state contract number and attach a detailed specification sheet, including any optional equipment needed. If not using a state contract, please acquire written quotes as per the Bid and Quote Limit guidelines.
 - b. Complete a requisition in the PeopleSoft Financials system and attach all required approved/signed forms.
 - c. Once the watercraft has been purchased, it must be registered and titled within 30 days of purchase. The dealer “(of department if received in error) must send all paperwork including the original “Manufacturer Certificate of Origin” (MCO).
 - d. Please be aware that some counties have an additional “optional county fee”. Please state which Florida County the watercraft will be used or stored.
 - e. The Procurement Services Department will notify the department of the cost obtained from the DMV. The department will then create a journal transfer to the Procurement Services Department account. Once the transfer is completed, the department will be able to pick-up the copy of

the title, registration and new license plate.

13. Procedure for a Trailer:
 - a. Same procedure as a car.
 - b. Under 2,000 lbs. need a “yellow state license plate.”
 - c. Over 2,000 lbs. need a title and a “yellow state license plate.”
14. Procedure for a Motorcycle:
 - a. Same procedure as a car.
 - b. A non-alternative fueled vehicle form is not necessary.
15. Procedure for an ATV/two rider, ATV/off-highway, Vehicle/off-highway Motorcycle:
 - a. Same procedure as a car.
 - b. A non-alternative fueled vehicle form is not necessary.
16. Auto Insurance Policy Documents:
 - a. The insurance policy can be downloaded from the [EHS website](#).
 - i. All vehicles should have an annually updated copy of this policy at all times, as well as a copy of the registration.

G. Acquisition of Duplicating/Copier Machines

1. General: Copiers and duplicating machines may be acquired by the university provided such equipment is the most cost competitive and effective units capable of meeting the university’s needs. All such acquisitions require the review and approval of Business Services. Contact that office concerning definitions and approval procedures for printing equipment.
2. Procedure:
 - a. After obtaining the approval of Business Services, submit the requisition to the Procurement Services Department so that the acquisition may be completed following established procurement procedures.
 - b. If the equipment is to be acquired by lease, lease/purchase or installment sale and purchase refer to Section 8A for procedures to be followed.
 - c. Appropriate Usage of Copiers, Printing and Duplicating Equipment: This equipment shall not be used to produce any material, the style and/or volume of which is determined to be counter-effective, uneconomical or illegal; nor shall it be used for any purpose other than in the production of material directly related to the business of the university.

H. Hazardous Materials

1. General: Various Federal, State and Local Regulations govern the purchase and use of hazardous materials and devices. Certain classes of these materials/devices require additional licensing prior to purchase. The Department of Environmental Health & Safety has been designated to provide oversight and approval of purchases where necessary.
2. Procedures:

- a. No hazardous materials, restricted or non-restricted, may be purchased with the university procurement card. Purchase orders must be used.
- b. The authorization for individuals to procure, use or possess restricted hazardous materials is granted by government agencies and is dependent on the conditions listed in permits or licenses. Contact EH&S for license and permit information. Classes of restricted hazardous materials are generally summarized by the following list:
 - i. Controlled Substances (drugs): Individuals must have a Federal Drug Enforcement Administration (DEA) license.
 - ii. Prescription Drugs, Medical Oxygen and/or Quantities of Diethyl Ether Greater than 2.5 Liters: Individuals must receive a Florida Department of Health permit or a written exemption.
 - iii. Explosive Materials: Individuals must have a State of Florida permit to be listed on the university's Federal Alcohol, Tobacco and Firearms (ATF) explosives license.
 - iv. Radioactive Materials: Individuals must be listed on the university's Florida Department of Health license.
 - v. Ionizing radiation-producing equipment (analytical and medical) must be registered with and inspected by the Florida Department of Health.
 - vi. Tax-free Alcohol (pure or 100 proof ethanol): Individuals must request permission to purchase on the university's Federal ATF permit.
 - vii. Select Agents (infectious biological materials and human toxins): Individuals must request permission to purchase and UCF EH&S must register the materials with the Federal Centers for Disease Control.
- c. Purchase orders for explosives, radioactive materials, tax-free alcohol and select agents must be approved by EH&S prior to processing the requisition through the Procurement Services Department. Departments are required to choose the appropriate category ID in PeopleSoft when creating a requisition. PeopleSoft workflow will route the requisition to EH&S as part of the approval process. Once it is approved it will flow to the Procurement Services Department for final approval sourcing.
- d. EH&S shall receive all radioactive materials at facilities. All other types of restricted hazardous materials may be received by the individuals who placed the order.

Ship to:

University of Central Florida

Attn: Renea Carver/Name of Authorized User

Libra Drive, Building 48, LES Room 109

Orlando, FL 32816

- e. Once received, individuals must keep all restricted hazardous materials secure. Records must be kept listing quantities used and quantities on hand. Such records are subject to state and federal audit on demand with no advance notice.

- f. The purchase of any radiation-producing machine with UCF PCards is prohibited. In addition, EH&S must approve in advance any purchase orders for machines that produce ionizing radiation.
- g. Departments ordering non-restricted hazardous materials are required to maintain an updated chemical inventory. Orders of hazardous chemicals must include a statement requesting the supplier to furnish Material Safety Data Sheets (MSDS). A copy should be forwarded to the Department of Environmental Health & Safety upon receipt.
- h. Whenever possible, purchased quantities should be kept to a minimum. Less toxic alternatives should be used when available.

I. Insurance

1. General: The university may purchase insurance as deemed necessary and appropriate for the operation and educational mission of the institution. Examples of coverage that may be acquired by the university include:
 - a. Physical damage to vehicles and trailers;
 - b. Inland Marine on property owned, leased, or loaned to or by the university;
 - c. Ocean Marine coverage for physical damage and liability to vessels and crew members;
 - d. Theft and direct physical losses to Scientific, Medical and IT equipment;
 - e. Equipment subject to transportation;
 - f. Equipment breakdown coverage for boilers, chillers and other large machinery;
 - g. Loss or damage to indoor fine art and other sculptures;
 - h. Excess general liability coverage;
 - i. Campus accident and sickness insurance.
2. Deductible: All insurance purchased for property damage shall have a minimum of a \$1,000 deductible; however, exceptions can be made after consulting with Environmental Health & Safety (EHS) Risk Management.
3. Requests for New Policies: Except for supplemental employee benefit insurance, all requests for new policies are to be reviewed and processed by EH&S Risk Management.
4. Premiums: Invoices for premiums to be paid from state or student activity funds will be reviewed by EH&S Risk Management prior to being processed for payment.
5. Insurance Clearing Points: In order to provide for an orderly flow of information and handling of claims the following clearing points are maintained within the university:
 - a. Student Government: Involved in the selection of Student Health Insurance Plan and acts as a liaison with the insurance broker and underwriter.
 - b. Director of Human Resources: Worker's Compensation, Employee's Group Health Insurance, Unemployment Compensation, Supplemental Employee Benefit Insurance and Annuities.

- c. EH&S Risk Management (ehs@ucf.edu): All other insurance types.
6. Claims: Because of the complexity and variety of insurance programs, claims are normally handled by the above listed clearing points on a case-by-case basis. To protect the rights of the injured and the university, all incidents which may result in a claim of any sort should be reported to the applicable clearing point without delay.

J. Advertisements: Newspaper/Publications

1. Advertisements for legal, classified or display ads in commercial newspapers should be placed by departments using the interdepartmental PCard. Submit a requisition to the Procurement Services Department only when the desired media will not accept a PCard.
2. Departments can also place employment ads in Career Builder by coordinating with UCF Human Resources Department.
3. For vendor contact information, please refer to the [Procurement Services Department website](#).

K. Furniture and Furnishing Standards

1. Objective: To secure durable, high quality office furniture at the best available price and the lowest furniture maintenance cost. The university has office furnishing standards which should be used when selecting furniture for your department. These standards were selected by an interior design firm and several university representatives. The standards offer a wide selection for departmental use. Contact the appropriate Procurement Specialist for more information on the standards and various contracts and vendors for flexibility in the selection of dimension and style.
2. Maximum Allowable Prices for Seating: Departments may purchase chairs from any vendor, however, the ergonomic chairs may not exceed the established maximum amount of \$675. Additionally, the following may only be purchased for reception or other public areas: 3 seat sofas: \$1,400; 2 seat love seats: \$1,100 and wing back (or similar chair): \$800.
3. Orders for Modular or Office Systems Furniture: The Florida Building Code requires modular furniture installations to be permitted and installed by a Florida State certified contractor. In an effort to expedite the process, the UCF Building Code Office (BCO) will review proposed furniture and seating changes prior to purchase. Acceptable documentation will be a to-scale dimensioned floor plan of the room(s) affected. Adequate ADA and life safety egress parameters for seating, podiums, aisles and access ways must be shown. Early plan review will avert purchases of furniture and seating that cannot be installed as intended and avoid delays for furniture and/or seating installations.
4. Specification Standards: The university has certain floor coverings (carpeting and padding), wall coverings (vinyl and laminates), and window coverings (draperies, blinds and solar film) standards that must be adhered to. Contact Facilities Improvement for additional information.

L. Moving Expenses

1. Definitions: For the purpose of clarity and uniformity the following terms shall have the meanings indicated:
 - a. Moving Expenses: Limited to the cost of packing, shipping, and storage of household goods or a mobile home, and reasonable expenses incurred for moving an automobile.
 - b. Household Goods: Personal effects and property of a current or prospective employee.
2. Exclusions:
 - a. Moving expenses as defined above does not include professional equipment and/or books which are necessary for job performance and housed at the university. Requests for moving laboratory equipment and professional books should be submitted on a separate requisition. Approximate value of items to be shipped should be indicated for insurance purposes.
 - b. Personal expenses associated with the movement of the employee or family member cannot be paid.
 - c. Payment for movement of household goods is normally limited to 15,000 pounds net weight.
 - d. Moving expenses do not include unpacking.
3. Approvals Required:
 - a. Payment of moving expenses for an employee is a perquisite. No formal commitment to expend funds for the payment of moving expense should be made unless prior approval is obtained from the appropriate vice president or Vice Provost, Faculty Excellence and International Affairs and Global Strategies.
 - b. Proposed moves of household goods up to a total of 15,000 pounds may be approved by the vice president or Vice Provost, Faculty Excellence and International Affairs and Global Strategies. Moves in excess of 15,000 pounds must be approved by the president. All approvals must be obtained in advance of the move.
 - c. Approvals must be on a fully completed [Request to Pay Moving Expenses form](#).
 - d. When payment of moving expenses for an employee is made by the university, it will be included on that employee's W-2 form as additional income.
4. Action by the Requesting Department:
 - a. An SUS contract has been implemented for the purpose of employee moves, including international moves, and will be used for each move requested. This is not an option for the department/prospective employee. The Procurement Services department can be contacted for this and information concerning formal bids and/or quotations.
 - b. The department/prospective employee should select ONLY ONE of the contact vendors. The department/prospective employee should contact the selected company and have them come out and give an estimate for

- the move. The department should then submit a purchase requisition, including detailed information concerning the move, i.e., place of origin, date of anticipated move, address, telephone numbers, and the name of the person to be contacted. The estimate should be included with the requisition when it is sent to the Procurement Services Department.
- c. At the time the requisition is prepared or sooner, a Request for Authority to Pay Moving Expenses form must also be prepared and approved. The department must forward the approved form together with the requisition to the Procurement Services Department.
 - d. Depending on the availability of funds, the department may agree to pay the entire amount of the move, or agree to pay a fixed amount with the employee paying the remainder. In this instance, the purchase order will be issued for that portion of the fixed amount authorized by the department. The employee will be responsible for paying the difference between the amount authorized by the department and the actual total cost of the move.
5. Action by the Procurement Services Department:
- a. Upon receipt of the requisition approved form and any backup documentation; a purchase order will be issued. Procurement Services will notify the awarded carrier. Carrier will then set-up with the employee for a move date for re-location. New employees are not authorized to place orders directly with moving vendors. The department however, after receiving approval and PO number from the Procurement Services Department may give that PO number to the awarded carrier.
 - b. Please prepare paperwork well in advance so there is plenty of time to coordinate the move. This is especially important for summer moves since it is one of the busiest times for movers.
6. Self-Move Guidelines
- a. There are times that a department is allowing only a small amount toward moving expenses and in those instances the new faculty/staff member may elect to move their own household goods via U-Haul, Penske or some other self-moving truck rental company. Should this be the case there are a few guidelines we think will help at the time of reimbursement. The university does not have a contract with any truck rental companies. The move will be paid for by the staff member and reimbursement will come after the receipts are received in the department.
 - b. What the department must do prior to the move:
 - i. Complete the Approval to Pay Moving Expenses form on the Procurement Services website.
 - ii. Obtain the proper signatures on that form prior to the move.
 - c. What the faculty/staff member must do:
 - i. Rent the truck and any equipment necessary to complete the household move (ex. a hand truck for heavy items).
 - ii. Purchase boxes, tape, packing materials and obtain receipts.
 - iii. Obtain receipts for all fuel purchased for the moving truck.

- iv. Obtain receipts for tolls if applicable.
- v. Decline any type of insurance offered unless the faculty/staff member is willing to pay for it. The State of Florida cannot reimburse for any type of insurance. (Advise the faculty/staff member to check on their homeowners and auto policies for items in transit coverage they may have it).
- vi. Submit all receipts pertaining to the move of household goods ONLY.

The university does not consider meal expenses as moving expenses.

- d. What the department does after the move:
 - i. Verifies the receipts submitted by the faculty/staff member pertain only to the moving of household goods.
 - ii. Verifies there is no charge for insurance that is being requested for reimbursement.
 - iii. Attach a copy of approval form to the requisition.

M. Hotel Accommodations

The Procurement Services Department’s website has a list of vendors that offer lower rates to the university than to commercial customers.

N. Renovation and Alteration Projects

1. Definitions:
 - a. Minor Projects: Includes repairing, altering, renovating, improving and demolishing any public facility. These projects are not to exceed \$2,000,000 unless approved by the Vice President of Administration and Finance. All projects must have prior approval by Space Planning Analysis & Administration (SPAA) and the Facilities & Safety Department before work can begin. The projects may require building permits and approval by the State Fire Marshall’s office prior to commencement. Facilities & Safety has this responsibility.
 - b. Minor Projects using Continuing Contract Agreements: Projects whose basic cost is estimated to be \$2,000,000 or less and when Consultant or Contractor has been selected using a competitive selection process.
2. Payment and Performance Bond: Florida Statute 255.05 requires that any person entering into a formal contract with the university for the construction of any public building or public work shall be required, before commencing the work, to execute a Payment and Performance Bond with a surety insurer authorized to do business in the state. However, contracts for \$100,000 or less shall not require a payment/performance bond.
3. Contractor’s Affidavit and Certificate of Completion: If a construction or alteration project involves Public Education Capital Outlay (PECO) funds and labor and costs are \$500 or more, a Contractor’s Affidavit and Certificate of Completion must be executed before the contractor’s invoice may be processed for payment.

4. Partial Payments: If partial payments are to be made to the contractor, this provision must be included in the contract.
5. Responsibilities: The Facilities & Safety Office is responsible for the construction of new buildings and modifications of existing buildings when the costs exceed \$2,000,000. As stated in paragraph 1. A. above, Facilities & Safety, through its Facilities Improvements Program is responsible for those projects \$2,000,000 or less.

O. Uniforms for Employees

Uniforms for use by university employees, to be paid from state appropriated funds, may not be purchased without prior approval of UCF's Office of Human Resources (HR). Contact the Office of HR, Compensation Section, for more information concerning the approval process. HR will forward to the department, Procurement Services and Finance & Accounting a copy of the perquisite form with the referenced approval number. Requester shall reference the perquisite number of the requisition in the comments area and attach a copy of the perquisite form to the requisition.

P. Approvals: External Agency or Government

The following commodity categories require approval of the external state regulatory agency indicated, prior to processing the acquisition:

<u>Commodity/Service</u>	<u>Approval Agency/Unit</u>
1. Information Technology Resources (Over \$500,000)	UCF Board of Trustees
2. All Communications Equipment	Division of Telecommunications (When appropriate)
3. Renovation Projects	State Fire Marshall

Q. Information Technology Resource Equipment

1. Definition: In general terms, information technology resource equipment is computer equipment that falls under the category of microcomputers, minicomputers, mainframes, stand-alone systems, or those integrated into any part of computer equipment, and peripherals for the above listed equipment.
2. General Information and Guidelines:
 - a. The Vice Provost for Information Technologies and Resources must approve all information technology resource acquisitions in excess of \$20,000.
 - b. The president on behalf of the Board of Trustees must approve all Information Technology Resource acquisitions over \$500,000.
3. Acquisition Procedures: All orders for information technology resources (computers, software, networking equipment, etc.) with a value of \$20,000 or greater require an approved Information Resource Request (IRR) form. Orders under the \$20,000 level can be processed directly through the Technology

Product Center (TPC) or the Procurement Services Department. The exception is, all wired and wireless network equipment regardless of the dollar amount must be processed by the Computer Services & Telecommunications for review and approval to ensure interoperability with the university's network.

- a. Customers completing a TPC or purchasing requisition, must forward the completed IRR form with associated equipment specifications to the Office of Information Technologies and Resources for approval. Requisitions over \$50,000 require an appropriate administrator's approval in addition to the IRR. The IRR form will be processed and returned within one working day if no additional information is needed.
- b. It is recommended that departments contact the Technology Product Center for the latest information on standard configurations that can result in significant cost savings to the university.
- c. When all necessary approvals have been received by the department, a copy of the requisition and accompanying documentation can be forwarded to the appropriate department for processing. University procurement standards will apply, e.g., state contract purchase, formal bidding, price quotations sole source, and state reviews, etc., when applicable.
- d. The IRR number will be included on the purchase order. If a change order is needed for a purchase order with an existing IRR, departments will need to reference the existing IRR number on the change order. The requisition, existing IRR and related documentation are to be forwarded to the Office of Information Technologies & Resources for approval.

R. Communications Equipment

Communications Technology Resources are subject to the same rules and regulations as Information Resource Technology equipment. In addition, the following guidelines apply:

1. All purchases, leases or acquisitions of communications services and/or equipment regardless of cost; require the review and approval of Telecommunications to ensure network interoperability, security and meeting standards. When applicable, UCF Telecommunications will coordinate with the State Division of Telecommunications (DIVTEL) to obtain their review and approvals under Florida Statute 282.702(8) and Florida Administrative Code, Rule Chapter 60FF-3.
2. Authority has been delegated to State Universities to acquire, lease and use broadcast communications equipment, facilities and services for FCC licensed broadcast stations. The president may sign, on behalf of the Board of Trustees, administrative documents relating to radio and television broadcast facilities (or services).
3. Acquisition Procedures:
 - a. General: Communications equipment includes, but is not limited to the following:
 - i. Cellular Telephones for University Business

- ii. Antennae
- iii. Facsimile Communications Equipment
- iv. Intercom Systems
- v. Pagers (Paging Receivers)
- vi. Radios (2-way, Portable or Vehicular)
- vii. Security Systems, Surveillance Cameras
- viii. Telephones and Telephone Equipment
- ix. Network Equipment (LAN Switches/Routers)

Audio Visual Equipment such as projectors, classroom record players, small tape recorders, etc., is not classified as communications equipment for the purposes of this requirement.

- b. Procedure: Telephones, telephone equipment, antennae, intercom systems, pagers, radios (2-way: portable or vehicular or repeaters), cellular telephones, Internet services, and voice/data/video circuits from telephone companies and/or long distance carriers, purchase or lease, must first have the approval of the UCF Telecommunications department prior to submitting the requisition to the Procurement Services Department. Requisitions for the purchase or lease of communications equipment shall be completed in the same manner as those for other acquisitions. However, UCF Telecommunications requires that a justification and proposed usage be provided to assist in the approval process. UCF Telecommunications serves as the university's liaison with DIVTEL, and will prepare and process all necessary forms. In addition, a local contact should be indicated, normally the individual having the most knowledge about the requested acquisition. For items available from state contracts, include the commodity number, state contract number, item description, price and vendor name and address. If UCF Procurement Services Department receives requisitions for communications services and/or equipment without UCF Telecommunications' indicated approval, they will be forwarded by the Procurement Services Department to Telecommunications for such approval.

For all other communications equipment include: complete specifications, make and model, number of item(s), pricing (if known), suggested vendors, and any other information related to the request. If assistance is needed in preparing specifications for formal bids, contact the Procurement Services Department. Trained UCF Telecommunications staff members are available to assist as needed.

UCF Telecommunications will complete state form COM 9008, Communications Purchase if required. It will then be forwarded to DIVTEL for approval. Normal processing time is ten (10) working days after receipt by DIVTEL.

S. Temporary Labor Services

- 1. General: The university entered into an agreement with suppliers to provide

temporary labor services in numerous categories. It is a university requirement that only these suppliers be contacted when a temporary staffing need arises in your department. Additional contract information is posted at www.procurement.ucf.edu.

2. Procedures:

- a. Price quotes shall be requested from only the awarded vendors. The number of quotes requested will depend upon the anticipated total amount of the required services.

Total Required Services	Quotes Required
\$35,000 and below	2
\$35,000.01 - \$75,000	3
\$75,000.01+	4

- b. Request for Quotes from departments to the vendors shall denote the following minimum requirements:
 - i. Type(s) of skills needed and a brief scope or description of work.
 - ii. Length of assignment (i.e., 1 week, 4 months, etc.).
 - iii. Location of assignment (physical work location).
 - iv. Hours of work (i.e. 8am – 5pm M-F).
 - c. Unless the need is urgent, provide each supplier 3 to 5 business days to respond to your request for quote by submitting their hourly bill rates and applicants’ resumes (if applicable).
 - d. Select the supplier based on the results of department’s quote request.
 - e. Submit a requisition with all suppliers’ quotes and related documentation attached.
3. Background Requirements: All temporary staff hired are required to have a background check performed by the temporary employment agency prior to commencement of a work assignment, pursuant to Florida level one background screening standards. This is to include: National Sex Offenders Registry, federal criminal database, national criminal history records, statewide criminal history background check through the Florida Dept. of Law Enforcement and Driver’s License records. The agency must provide the university hiring official with certification that the background check was performed and cleared by the agency. Depending upon the nature of the position or duties required, the hiring officials may request the agency to perform additional levels
4. Temporary staffing under an existing contract with a supplier will continue to be honored through the completion of those assignments. Any new staffing requirements must be obtained under the university’s staffing contract.
5. Recruitment of permanent executive staff shall be processed by engaging executive search firms and others that are in the business to provide those type specialized/high level placements.

9. RECEIVING

A. Receiving Report

1. General: The ultimate responsibility for receiving and accepting purchase order items rests with the ordering department. Receipts will be recorded in the asset management module of PeopleSoft. It is prohibited to have official shipments shipped to an individual's personal address.
2. Procedures:
 - a. Central Receiving: This section will assist departments in the receipt of material:
 - i. Inspect containers for external damage and sign shipping documents to acknowledge receipt of packages.
 - ii. Departments may request scientific and/or technical items not be opened for initial inspection by Central Receiving. Departments must ensure "do not open" comments are included in the purchase requisition header comments section in PeopleSoft.
 - iii. Packages will be inspected for obvious physical damage, quantities verified and delivered to the department, at which time the department representative will sign the delivery report.
 - iv. Assist departments in processing claims for any shipping damage.
 - v. Central Receiving will coordinate with the receiving department for acceptance of COD or freight collect charges. The department will send a representative to Central Receiving to accept the stated shipment and is responsible for payment of all related COD charges.
 - vi. At the time of delivery, it is also the receiving person's responsibility to sign for the packages delivered on the Central Receiving delivery log. This signature will document the transfer of custody of property from Central Receiving to the gaining department.
 - b. Receiving Departments:
 - i. Upon receipt of items delivered by Central Receiving personnel, the receiving department (requisition approver) must promptly inspect and complete the inspection fields in PeopleSoft if the purchase order was set up for inspection. If the department is unable to make an inspection at the time items are to be delivered, an arrangement must be made to inspect the shipment within two (2) working days.
 - ii. If goods or services are received directly from a vendor, the receiving department must promptly ensure that shipment is correct and goods were not damaged. If receiving is required on the purchase order, the department will contact Central Receiving to notify them of the delivery by e-mail, and request

that the receiving transactions be completed in PeopleSoft. The department will e-mail the PO number and quantities received to Central Receiving.

- iii. If materials are received prior to the issuance of the purchase order, the department shall forward with their requisition a copy of the invoice or other vendor shipping document annotated with an "OK to pay", two authorized department signatures, the date received, and the purchase order number which was assigned by the Procurement Services Department to the order.
 - iv. If vendors fail to meet the delivery date specified on the purchase order, the department should contact the Procurement Specialist whose name or initials appear on the order.
3. Receiving Blanket Agreement Orders: Receiving for blanket POs is done through departments, not through Central Receiving. F&A will accept either e-mail verification of receipt or signed invoices by appropriate department personnel.
 4. Expediting Orders: When a vendor fails to deliver to Central Receiving on time, the requesting department can request updated shipping information by calling the Procurement Specialist whose name or initials appear on the order for delivery time information.
 - a. If the vendor's reply indicates an unacceptable delivery time, the Procurement Director should be contacted so action may be taken to secure a more timely delivery.
 - b. If a department desires delivery prior to the delivery date indicated on the purchase order, a request for an earlier delivery date should be made to the Procurement Specialist whose name or initials appear on the order. Departments are cautioned not to contact vendors directly to advance delivery dates, since this action may be construed as a change order and additional costs may be incurred as a result.
 5. Pick-ups by Departments from Central Receiving: Even though pick-ups at the Central Receiving building are discouraged, it is recognized that the urgency of need or other circumstances will require it. Those persons given authority to make a pick-up must present a UCF photo identification card to the Central Receiving Section before a pick-up will be permitted.

B. Unsatisfactory Shipment

1. Damage to shipments must be recorded and processed in accordance with regulations applying to common carriers. **Visible Damage** shall be noted on the freight company's receipt at the time of delivery. **Concealed damage** must be officially reported to the freight company within fifteen (15) calendar days after the company delivers the items to the university.

Failure to timely report damage will result in the university's loss of its right to file a claim and collect for the damage. Upon receipt of the damage report, the carrier will visit the university, inspect the alleged damage, and furnish a copy of the inspection report. A copy of the freight bill and inspection report must

accompany any claim for damage.

2. In case of damage to a shipment short of total destruction, it is the university's legal duty to accept the shipment. Non-acceptance may jeopardize any future claims. In most cases, the university must pay for the damaged goods in order to present proof of payment to the carrier for reimbursement.

C. Unsolicited Goods

Florida Statute Section 570.545 states that a person is not obligated to return unsolicited goods to the sender. The law also states that unsolicited goods shall be deemed a gift and the recipient may use or dispose of them in any manner without obligation to the sender.

10. PROTEST/DEBARMENT

A. Authority to Resolve Protested Solicitations and Awards

1. Any actual or prospective bidder who disputes the reasonableness or competitiveness of the terms and conditions of an Invitation to Bid or Invitation to Negotiate issued by the university must file a written protest within seventy-two (72) business hours after such time bidder knows or should have known the facts giving rise thereto.
2. The Procurement Director shall have the authority, prior to the commencement of any formalized proceedings concerning the controversy, to settle and resolve a potential protest by mutual agreement with the aggrieved bidder or contractor, actual or prospective, concerning the solicitation or award of a contract.

If the protest is not resolved by mutual agreement by the vendor and Procurement Director, the matter will be resolved in accordance with the proceedings set in the Florida Board of Governor's regulation 18.002.

B. Authority to Suspend or Debar Vendors

The Vice President for Administration and Finance and Chief Financial Officer or designee shall be authorized to suspend or debar vendors and contractors. Debarment or suspension is a serious action which must be based on adequate evidence rather than mere accusation. This assessment should include an examination of basic documents, such as contracts, inspection reports and correspondence. Debarment or suspension will be for the purpose of protecting the interests of the university. See [UCF Reg 7.124](#).

11. SMALL, MINORITY, AND WOMAN OWNED BUSINESSES

A. General

The president's goals of Diversity and Inclusiveness and Partnerships are two of the driving motivators in having a strong diversity in contracts program. The program's charter is to promote and encourage the use of small, minority-owned, woman-owned,

and service-disabled Veteran-owned businesses, (S/MWVBE) by UCF Departments. S/MWVBEs sometimes meet the criteria of a socioeconomically disadvantaged business.

B. Definitions:

1. **Small Business:** means an independently owned and operated business concern that employs 200 or fewer permanent full-time employees and that together with its affiliates has a net worth of not more than \$5 million or any form based in this state which has a Small Business Administration 8(a) certification. As applicable to sole proprietorships, the \$5 million net worth requirement shall include both personal and business investments.
2. **Minority Business Enterprise:** any small business concern, as defined in (1) above, which is organized to engage in commercial transactions, which is domiciled in Florida, and which is at least 51% owned by minority persons who are members of an insular group that is part of a particular racial, ethnic, or gender makeup or national origin, which has been subjected historically to desperate treatment due to identification in and with that group resulting in an under representation of commercial enterprises under the group's control, and whose management and daily operations are controlled by such persons. A minority business enterprise may primarily involve the practice of a profession.
3. **Minority Person:** a lawful, permanent resident of Florida who is:
 - a. **An African American:** a person having origins in any of the racial groups of the African Diaspora, regardless of cultural origin.
 - b. **A Hispanic American:** a person of Spanish or Portuguese culture with origins in Spain, Portugal, Mexico, South America, Central America, or the Caribbean, regardless of race.
 - c. **An Asian American:** a person having origins in any of the oriental peoples of the Far East, Southeast Asia, the Indian subcontinent, or the Pacific Islands, including Hawaiian Islands prior to 1778.
 - d. **A Native American:** a person who has origins in any of the Indian Tribes of North America prior to 1835, upon presentation of proper documentation thereof as established by rule of the Department of Management Services.
 - e. **An American woman.**
4. **Socioeconomically Disadvantaged Business Enterprises:** African Americans, Hispanic Americans, Native Americans, Asian-Pacific and Subcontinent Asian Americans, and women are presumed to be socially and economically disadvantaged. Other individuals who can be characterized as socially and economically disadvantaged individuals must receive DBE certification from their relevant state, local, or recognized third party such as the Woman's Business Enterprise National Council or the National Minority Supplier Development Council. Irrespective of what the size standard is, a firm cannot exceed the size of \$22.41 million and still be seen as a Small Business. The size limit is periodically adjusted for inflation.
5. **Certified S/WMBE:** a business which has been certified by the certifying organization or jurisdiction, whether local, state, federal or a third party

certifying agency with an approved and streamlined validation process such as the Woman's Business Enterprise Council and the National Minority Supplier Development Council.

6. Service Disabled Veteran Owned Business: a business which is at least 51% owned by one or more veterans or service-disabled veterans; and the management and daily business operations of which are controlled by one or more service-disabled veterans.

C. Coordination with Local S/MWVBE Agencies

Procurement Services provides electronic notices of all advertised formal solicitations for contractual services, supplies, and commodities to its S/MWVBE agencies and any other entity that requests to be on its notification list. The diversity in Contracts Associate Director shall receive all formal solicitations in a timely manner to ensure an adequate number of S/MWVBEs are located and given an opportunity to respond.

D. Vendor Development

In order to assist the Procurement Services Department, the cooperation and assistance of each department is required. Some suggested ways of assisting are as follows:

1. When in contact with a known S/MWVBE concerning source selection, include the name, address, phone number, and e-mail address of the firm on the purchase requisition as a suggested vendor. Indicate the S/MWVBE on the requisition, if known.
2. When a S/MWVBE calls, ask that he/she contact the Procurement Services Department's Diversity in Contracts Associate Director for additional information concerning doing business with the university.
3. While attending community civic business meetings where S/MWVBE representatives are present, encourage them to contact Diversity in Contracts Associate Director for discussion about doing business with the university.
4. Consider using S/MWVBE's to fulfill some of your department's orders.
5. Ensure that an S/MWVBE is included in every quote. Contact the Diversity in Contracts Associate Director to add to your selection list.

E. S/MWVBE Directories

A listing of state certified minority and small businesses can be found [here](#) or contact the Diversity in Contracts Associate Director at Procurement Services for an extensive search of qualified S/MWVBE supplies.

F. Diversity in Contracts Associate Director

This individual is charged with the responsibility of seeking out and encouraging increased S/MWVBE activity in our daily procurement activities by serving as an advocate and sourcing agent for known upcoming opportunities. He/she is available to

assist in locating S/MWVBEs and answering questions concerning UCF's Diversity in Contracts Program. The Associate Director will also assist in the evaluation of contracts awarded and seek long-term procurement partnerships between S/MWVBE and the university.

12. SURPLUS PROPERTY

A. Acquisition of University Surplus Property

Information on university-owned property which has become surplus may be obtained by accessing the weekly [Surplus Property Listing](#).

B. Disposition of State Owned Tangible Property

When a department determines that certain property has become surplus because it is excess, obsolete, uneconomical, or inefficient for continued use, it shall be certified as surplus by the custodian of the property to the UCF Property Administrator. The Property Administrator will assist in completing the proper forms for disposition and will place them on the agenda for consideration by the UCF Property Board. This board is appointed by the Vice President of Administration and Finance and Chief Financial Officer to oversee surplus property practices and determine disposition actions. Contact the Property Administrator for information concerning handling of surplus items, as well as procedures concerning trade-in of state-owned tangible property.

C. UCF Property Donations, Returns and Trade-in Memo

Found on the [Procurement Services Department website](#).

D. UCF Property Control Regulations

Found at [Chapter 4 UCF Regulations](#).