

# UCF Procurement Services



UCF

# Agenda

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- Mission
- Competition Requirements
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# Mission

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

**Process and Administer Formal Solicitations**

**Process Requisitions for Goods and Services**

**Input Supplier Data for Corporate Suppliers**

**Review and Approve Contracts**

**Manage Diversity in Contracts Program**

# Competition Requirements

**\$10,000 and below**

Quotes are not required but are encouraged



**\$10,000.01 - \$35,000**

At least **two** informal quotes from competing suppliers



**\$35,000.01 - \$75,000**

At least **three** formal written quotes from competing suppliers



**Over \$75,000**

Formal competitive solicitations or exempted from competition

**Note:** Procurement Services reserves the right to bid any requirement, regardless of dollar value, when determined to be in the best interest of the university. We encourage obtaining quotes at each level from diverse vendors (small, woman or minority-owned businesses, etc.).

# Competition Exemptions: Waiver/Sole Source

	Waiver of Competition	Sole Source
<b>Dollar Thresholds</b>	\$10,000.01 - \$75,000	\$75,000.01+
<b>Approvals</b>	<p><b>\$10,000.01 - \$35,000</b></p> <ul style="list-style-type: none"> <li>PI/Researcher/Director/Chair</li> </ul> <p><b>\$35,000.01 - \$75,000</b></p> <ul style="list-style-type: none"> <li>Associate Dean/Associate Vice President/Associate Provost</li> <li>Procurement Specialist</li> <li>Director/Designee</li> </ul>	<ul style="list-style-type: none"> <li>PI/Researcher/Director/Chair</li> <li>Dean/Vice President/President</li> <li>Procurement Specialist</li> <li>Associate Director</li> <li>Director</li> <li>Vice President of Administration &amp; Finance (routinely confers with Provost for academic purchases)</li> </ul>
<b>Notifications</b>	None	Posted on Procurement Services website for 72 business hours

# Competition Exemptions: Adoptable/Piggyback Contracts

Existing contracts can be used at any dollar amount without additional competition to acquire needed goods and services.

Must have been competitively solicited and awarded, contain same scope of work, and contract dates must be effective.

## Any active public contract

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

## Cooperative Purchasing Contracts

- Educational and Institutional Consortium (E&I)
- US Communities Government Purchasing Alliance
- Sourcewell f/k/a National Joint Powers Alliance (NJPA)
- WSCA-NASPO Cooperative Purchasing Organization

# Unauthorized Procurement Actions (UPAs)

Violation of UCF Policies [2.102.3](#) & [2.107.5](#) and Regulation [7.130](#)

## Penalties for non-compliance

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

Consequences to university's resources and reputation

Violators could be directed to pay the supplier with personal funds

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



# How Do UPAs Occur?

Authorizing a supplier to provide goods or services without having a purchase order (PO) **or** bilateral agreement/contract in place

Failing to submit a requisition within 30 days of delivery after a bilateral agreement/contract was executed

Procuring goods or services without following the appropriate procurement method

Renewing contracts after expiration

Signing a contract when there is no signature authority or monetary level exceeds signature authority



# How To Avoid UPAs

**#1 Rule:** Have a purchase order in place first!

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

Renew contracts timely and ensure a purchase order is in place prior to the start of a renewal contract term.

Do not sign any documents unless you have signature authority and only after legal review (submit through CobbleStone).

Have an appropriate procurement method in place according to value of the goods/services being procured.



# Contract Review

All contracts requiring signatures must route through **Cobblestone**.

Contract requirements include background information, description of what is being purchased, term dates, renewals, total dollar value (keep in mind competition requirements).

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

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

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

Contracts over \$500,000 require UCF president's review and approval.

Amendments/modifications to a contract either previously approved by the president or that take the value of the contract over \$500,000 will require president's review and approval.

# Helpful Requisition Tips

Requisitions under \$1,000 require a PCard Waiver Statement in the requisition header (DEP-D017).

Ensure descriptions used on requisition lines are clear.

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

Blanket purchase orders are valid for the current fiscal year only.

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

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

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

# Helpful Requisition Tips Con't

Requisitions over \$500,000 require president's approval.

Change orders to requisitions originally approved by the president require president's approval, regardless of the dollar value.

Change orders to a requisition that will increase the total value of the PO to over \$500,000 will require the president's approval.

Include any backup information on the requisition (quotes, Cobblestone contract, etc.).

POP  
QUIZ!

# Procurement Services Contacts

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**Any questions?**

**Thank you!**

