

# UCF Procurement Services



UCF

# Agenda

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- PCard
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# Mission

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

**Process and Administer Formal Solicitations**

**Process Requisitions for Goods and Services**

**Supplier Data Input for Corporate Suppliers**

**Review and Approve Contracts**

**Manage Diversity in Contracts Program**



# Price Threshold Guidelines

**\$10,000 and below**

Quotes are not required but are encouraged



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

Two or more informal quotes are required



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

Three or more written quotes from competing suppliers



**Over \$75,000**

Formal competitive solicitations or exempted from competition

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

# PCard

Program is managed by Finance & Accounting

Must be used for purchases under \$1,000, unless for prohibited items, hazardous materials, or vendor doesn't accept PCards

Primarily for purchases under \$5,000

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

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

For a list of prohibited purchases, visit:

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

# Solicitation Types

**Request for Information (RFI):** Informal research and information gathering document; used to create viable requirements for a potential solicitation; cannot be used to make an award – only a fact finder

**Invitation to Bid (ITB):** Detailed specifications for a specific good or service; suppliers can bid on the same items; awarded to lowest responsive and responsible bidder; average cycle time: 10-60 days

**Invitation to Negotiate (ITN):** Complex purchases where specifications are not clearly defined; suppliers propose best solutions; award is based on best value and interest to the university; average cycle time: 40-180+days

# Competition Exemptions

Allowed per UCF Regulation 7.130

Board of Governors:

<http://www.regulations.ucf.edu/chapter7/documents/7.130PurchasingFINALJan17.pdf>

Annual Certification of Sole Source and Non-Competitive Items:

<https://procurement.ucf.edu/wp-content/uploads/sites/3/2018/07/Sole-Source-Certification-FY18-19.pdf>

Waiver/Sole Source

Adoptable/Piggyback



# 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><i>\$10,000.01 - \$35,000</i></b></p> <ul style="list-style-type: none"> <li>• PI/Researcher/Director/Chair</li> </ul> <p><b><i>\$35,000.01 - \$75,000</i></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.

Contract must have been competitively solicited and awarded, have the 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
- Sourcwell f/k/a National Joint Powers Alliance (NJPA)
- WSCA-NASPO Cooperative Purchasing Organization

# Unauthorized Procurement Actions (UPAs)

Violation of UCF Policies [2.102.3](#) and [2.107.4](#) and Regulation [7.130](#)

## Penalties for non-compliance

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

Consequences to university's resources and reputation

Violators could be directed to pay the supplier with personal funds

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

# How Do UPAs Occur?

Contract was executed and services initiated without a purchase order and/or does not meet procurement guidelines

Authorizing supplier to begin work and invoice for services rendered

Renewal of contracts after expiration

Contract signatory not authorized to sign contracts

# How Do I Avoid UPAs?

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

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

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

Do not sign any documents unless you have signature authority and only after legal review.

# Contract Review

All contracts requiring signatures must route through Cobblestone.

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

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

# Helpful Requisition Tips

Requisitions <\$1,000 require a PCard Waiver Statement in the requisition header (Standard Comment DEP-017).

Ensure descriptions used on requisition lines are clear.

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

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

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

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

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

# Procurement Services Contacts

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**Any questions?**

**Thank you!**



**UCF**