

UCF Procurement Services

College of Community Innovation and Education

March 3, 2020



UCF

Agenda

- Introductions
- Mission
- Competition Requirements
- Competition Exemptions
- Unauthorized Procurement Actions
- Contract Review
- Helpful Requisition Tips
- Procurement Services Contacts
- Questions and Answers

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-, veteran-, or minority-owned businesses).



Competitive Solicitations: Invitation to Bid/Invitation to Negotiate

	Invitation to Bid	Invitation to Negotiate
When to Use	Defined specifications for a specific good or service	Complex purchases where specifications are not clearly defined
Method of Award	Lowest responsive and responsible bidder meeting specifications	<ul style="list-style-type: none"> • Best interest to university • Points-based evaluation with consideration of multiple criteria
End User Responsibilities	<ul style="list-style-type: none"> • Develop specifications/requirements • Provide list of known suppliers with contact information • Approve lowest responsive and responsible bidder 	<ul style="list-style-type: none"> • Develop specifications/requirements • Develop and design evaluation criteria • Provide list of known suppliers with contact information
Average Cycle Time	<ul style="list-style-type: none"> • 10 days: urgent • 30 days: routine & clean specifications • 60 days: complex 	<ul style="list-style-type: none"> • 40 days: urgent • 90 days: routine & clean specifications • 180 days: complex



Competition Exemptions: Waiver/Sole Source

	Waiver of Competition	Sole Source
Dollar Thresholds	\$10,000.01 - \$75,000	\$75,000.01+
Approvals	<p>\$10,000.01 - \$35,000</p> <ul style="list-style-type: none"> PI/Researcher/Director/Chair <p>\$35,000.01 - \$75,000</p> <ul style="list-style-type: none"> Associate Dean/Associate Vice President/Associate Provost Procurement Specialist Assistant Vice President Tax, Payables & Procurement/Designee 	<ul style="list-style-type: none"> PI/Researcher/Director/Chair Dean/Vice President/President Procurement Specialist Associate Director Assistant Vice President Tax, Payables & Procurement Chief Financial Officer (routinely confers with Provost for academic purchases)
Notifications	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, contain same scope of work, and contract dates must be effective

UCF pricing must be the same or lower than the original contract's pricing

Procurement will evaluate and approve using the contract before a PO is sourced or contract with UCF is approved



Competition Exemptions: Adoptable/Piggyback Contracts

Any active contract awarded by other public agencies (universities, colleges, states, etc.)

Contracts through cooperative purchasing groups (Educational and Institutional Consortium, OMNIA, Sourcewell, etc.)

Supplier is the best source of information

Information to provide for review: executed piggyback contract between supplier and contracting agency, solicitation document to show how the contract was approved, and awarded supplier's response to the solicitation



Unauthorized Procurement Actions (UPAs)

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

Penalties for non-compliance

Consequences to the university's resources and reputation

Violators could be directed to pay the supplier with personal funds



Unauthorized Procurement Actions (UPAs)

UPA form must be signed VP/Dean (**NO designee**)

Web training course (UPAVIO) required for employees who have committed a UPA; Procurement will enroll employee

Twenty (20) business days to complete the course and pass with an 80% or higher

Web training course (PURUPA) required course for employees requiring PRA or PRC access in PeopleSoft – UCF Financials.



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 the value of goods/services being procured. Review the university's [competition requirements](#).



Contract Review

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

Complete General Counsel's Contract Routing Form.

Software/hardware contracts over \$20,000 require IT review through IRR and ISO form.

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



Contract Review

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 bring the value of the contract over \$500,000 will require president's review and approval.



Helpful Requisition Tips

Requisitions under \$1,000 require PCard Waiver Statement in the requisition header (DEP-DO17).

PCard purchases over \$5,000 require a purchase order prior to the transaction.

Item/service descriptions on requisitions should clearly state what is being ordered.


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

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

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




Helpful Requisition Tips




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



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



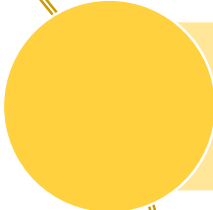
Change orders to requisitions originally approved by the president require president's approval, regardless of the dollar value.




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




Helpful Requisition Tips



When ordering equipment, keep in mind the impact to the facility. Infrastructure, EHS & ADA compliance should be considered prior to the purchase to ensure a smooth installation. Contact EH&S or Facilities Planning and Construction for assistance.



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



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



Procurement Contacts

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New Location

We've moved!

Research Pavilion, Suite 355
12424 Research Parkway
Orlando, FL 32826



POP
QUIZ!

Any questions?

Thank you!

