



UNIVERSITY OF CENTRAL FLORIDA

Procurement Services

*Procedures for compliance with
UCF Procurement Services*

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I. INTRODUCTION & POLICY

A. Introduction

Procurement Services is a service department organized to support the students, the instructional and research efforts of faculty and staff, and other university service departments of the University of Central Florida.

Procurement Services involves the acquisition of commodities, services, and leases of space for the university within preestablished budgetary constraints. Procurement Services also assists with planning and preparing invitation to bid and invitation to negotiate specifications; initiating formal quotations, invitations to bid and invitations 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 (BOG) 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 irrespective of funding source, including federal assistance monies; except that, University Direct-Support Organizations' (as defined in Section 1004.28, F.S.) and support funds (UCF Foundation, Alumni Association non-appropriated funds, etc.), 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. Authority and Responsibility

Procurement Services derives its authority and responsibilities from BOG Regulation Chapter 18 and [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 conferred 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. Procurement Services has the duty to:

1. Develop procurement procedures
2. Canvas sources of supply and contracting, for the purchase or lease of all commodities and contractual services for the university in any manner, including procurement 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 from doing business with the University for demonstrated cause, including previous unsatisfactory performance

4. Plan and coordinate procurements in volume and negotiate and execute agreements and contracts for commodities and contractual services under which the University may make procurements
5. Where practical and available, implement the use of existing State University System (SUS) Shared Initiatives contracts, unless the Director of Procurement/Chief Procurement Officer or designee documents that such use is not in the best interest of the university
6. Develop an Annual Certification List to serve as a waiver of the competitive solicitation requirement for commodities and services that are frequently purchased and are available from a single source
7. Evaluate, approve, and utilize contracts that are entered into after a public and open competitive solicitation by any State of Florida agency, department, Florida state college or university, the Federal Government, other states, political subdivisions, cooperatives or consortia, or independent colleges or university 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 led by such other entities. The University must maintain appropriate justification for use of services under contract adoption. Adopted contracts under this provision may be negotiated by the University to ensure appropriate state law and to achieve improved terms and pricing; however, the resulting contract's general purpose and scope of purchase must be within the scope of the original contract being adopted. The adopted contract must be current (i.e., not expired). The University shall review existing consortia and cooperative contracts to identify potential savings and, if there is the potential for savings, enter into new consortia and cooperative contracts to achieve the savings, with the goal of achieving a five-percent savings on existing contract prices.
8. 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 a 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
9. Award contracts for commodities and contractual services to multiple suppliers 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
10. Reject or cancel any or all competitive solicitations when determined to be in the best interest of the Institution
11. Inspect the relevant 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, when specified in the agreement
12. Prescribe the methods of securing bids or negotiating and awarding contracts
13. 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
14. Develop, distribute, and maintain the policies and procedures manual of the UCF Procurement Services Department.

D. 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 UCF Office of the General Counsel according to [UCF Policy 2-102.4](#). Signature authority for entities other than the Procurement Services Department is set out in [UCF Policy 2-107.7](#). 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: \$500 fine assessed against the department or unit.
3. Third and subsequent violation: \$1,000 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.

E. Transaction Authority for Purchases

All College and Division Service Centers have assigned cost center manager(s) to approve all spend related transactions (ie, requisitions, change orders, spend authorizations, expense reports), regardless of dollar amounts. Additional cost center manager approvals are required based on the dollar amount.

Cost Center Manager	Always Required
Cost Center Manager 2	Greater than \$75,000
Cost Center Manager 3	Greater than \$250,000
Cost Center Manager 4	Greater than \$1,000,000
Cost Center Manager 5	Greater than \$5,000,000

To update cost center manager(s), submit a case in Workday Help using case type Security Role.

F. Ethics and Standards 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. Conflicts of Interest and Gratuities: [UCF Policy 4-504.3](#)

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 with which 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](#)
 - a. It shall be a breach of ethical standards for: (a) 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) 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) any university or university direct support organization employee participating on a procurement selection committee to solicit donations from responding suppliers during the selection process, except for donations or benefits expressly stated in the procurement document.

H. Prohibited Purchases

See Financial Affairs' Expenditure Guidelines on the appropriate use of funds [Expenditure Guidelines](#) and the CardPro Office [guidelines](#) and restrictions for Expense Card purchases.

I. Purchases for Individuals

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

J. Splitting of Orders

[UCF Regulation 7.130](#) states that deliberate attempts to split orders, where the purpose is to keep the total cost for each order below the competition requirements, are an evasion of UCF procurement procedures and are therefore unlawful. Orders should only be consolidated or combined when practical, for the interest of economy.

This applies to multiple requisitions to the same supplier 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 creating 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 \$25,000. Amounts exceeding \$150,000 will require competitive solicitation through Procurement Services. Departments identified as splitting orders will be brought to the attention of the Assistant Vice President of Tax, Payables & Procurement or designee.

II. 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: That portion of printing (other than Class A Legislative Printing; ie driver's license application, passport application) which may be circulated to and/or used by the general public and government entities other than agencies of the State of Florida; ie brochures, recruiting materials.

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 includes 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/Supplier: 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 that 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.

Cost Center/Department: An identifier for financial responsibility and oversight of a managed and budgeted entity

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

in such place designated in the contract completes the contract.

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

Expense Card: Credit card that is set up for expense usage in Workday. It may only be used for non-PO purchases. Expense Cards should be utilized for travel purchases, regardless of the dollar amount, and non-PO purchases under \$5,000.

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

Financial Affairs: The unit and employees encompassing the former Finance & Accounting department and Procurement Services. Procurement Services is a part of the division but has its own separate functions and is referred to as a separate entity to clarify their distinct functions where applicable.

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 competition requirement. Award is made to the lowest responsive and responsible bidder(s).

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 supplier experience, project plan, design features of the product(s) offered, etc. An 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. Award is made to the responsible Respondent(s) whose offer(s) represent the best interest to the University, after evaluation in accordance with the criteria in the solicitation.

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.

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 Card: Credit card that is set up for procurement usage in Workday. It may only be used for P.O. purchases. Purchases made via a Procurement Card should be tied to a purchase order in Workday. Distribution is limited to select users in the College/Division Business Center and kNEXT.

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.

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.

Punchout: Connection to a supplier website within Workday, that allows users to shop a supplier's catalog of goods and services. Suppliers have an approved contract with the university and the website pricing reflects contracted pricing. Allows for expedited processing of transactions with the placement of order, approval, receiving and payment processes all occurring in Workday.

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

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 service.

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

Spend Category: Provides a granular view of expenses incurred at the University. Grouped into hierarchies and mapped to ledger accounts for financial reporting. Required on all expense transactions. These codes drive accounting behavior.

Term or Annual Contracts: 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. The initial term and renewal periods are taken into 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.

III. REQUISITIONS

The purchase requisition is used to request purchases of all commodities/services through Procurement Services. The requisition 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 University uses Workday for procurement transactions. Departments can create, approve, and budget check requisitions at their own location, which are then available for procuring and sourcing to purchase orders. The College/Division Finance Business Center(s) will have personnel properly trained to enter and approve requisitions.

B. Competition Requirements

1. Less than \$25,000: Quotes are not required, but competition is encouraged. Quotes from small, minority-, woman-, and veteran-owned business enterprises (SMWVBEs) are encouraged.
2. \$25,000.01-\$75,000: At least two informal price quotes are required. At least one quote from a SMWVBE is encouraged. Quotes can be obtained by telephone and annotated on the purchase requisition in the internal memo field or attached to the purchase requisition. Document as much information on the commodity/service as possible from each supplier (make, model, prices, delivery info, discounts, etc.) to assist Procurement Services in properly comparing the quotes to determine the most reasonable cost.
3. \$75,000.01-\$150,000: At least three formal written quotes or more from different companies are required. At least one quote from a certified SMWVBE is encouraged. Quotes must be on the companies' stationery/fax cover, etc. and signed by their authorized representative. Quotes must be attached to the purchase requisition.
4. \$150,000.01 and over: A formal invitation to bid/invitation to negotiate is required unless otherwise exempted from competition. SMWVBE 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: For purchases between \$25,000.01 and \$150,000, Procurement Services can assist in obtaining quotes if a department's research falls short. If the required number of quotes cannot be obtained, Procurement Services' management can waive the competition requirement if the request is properly justified. The approved Waiver of Competition must accompany the purchase requisition. A waiver should not be requested to avoid competition.
 - c. Sole Source Certification: When competition is not possible for a purchase over \$150,000, a sole source exemption may be granted by the Chief Financial Officer. Sole source purchases require extensive written justification from the department. The approved Sole Source Certification form must accompany the purchase requisition. A sole source should not be requested to avoid competition.
 - d. \$5,000,000: The president is authorized to contract for goods and services up to any dollar amount and approves any purchase exceeding \$5,000,000. The Assistant Vice President of Tax, Payables & Procurement has authority up to \$1,000,000 in expenditures and \$100,000 for leases but is authorized to approve acquisitions exceeding that amount from a procurement perspective, if already approved by the president.
5. \$20,000 and over: Information technology resources require an Information Resources Request (IRR) and approval of the UCF IT vice president and CIO. The approved IRR number shall be included on the requisition.
6. University telecommunication services are administered by the Telecommunications department within UCF IT. UCF IT is the sole 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 UCF IT. For further information please refer to [UCF Policy 4-003.2](#). Telecommunication services, supplies or equipment must be documented showing approval has been granted.

7. Planning, Design and Construction (PDC) manages all planning, design, and construction services for the university. This includes the procurement and selection of design and construction services, concept studies, preparation of the annual Capital Improvement Plan, the Campus Master Plan, and the Campus Development Agreement. PDC, a department within Facilities and Safety is the sole source and only entity authorized to perform these functions and may charge a management fee related to the production of cost estimates and project management. Refer to [UCF Policy 3-114](#).

C. Procurement and Expense Cards

1. The university operates its own Procurement and Expense 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. Cardholders can use their Procurement Card or Expense Card to purchase allowable goods and services as long as the expenditures follow required state and university regulations and guidelines.
2. Financial Affairs is the issuing authority for Procurement and Expense Cards and has an Administrator to manage the program. Cost Center Managers select individuals in good standing to be cardholders.
3. For additional information regarding Procurement and Expense Cards please review the [Procurement Expense Card Manual](#).

D. Procurement Cycle

1. The procurement cycle is an estimate of the time it takes for a requisition to be sourced to a purchase order and issued to the supplier. The length of time will vary on the volume of transactions at the business center, dollar value, spend category, and worktag(s) used, as additional approvals may be required.

E. Requisition Processing Procedures

1. The procedures set forth below outline the manner in which the requisition should be completed:
 - a. All requisitions are approved by at least two individuals: the cost center procurement coordinator and the cost center manager. Additional approvals may be required depending on the worktags, dollar amounts, and spend categories on the requisition.
 - b. Procurement Specialists are in the workflow chain and will review requisitions greater than \$25,000.00, to determine whether they are appropriate for sourcing into a purchase order. Punchout purchases are exempt from this requirement. Requisitions not approved by the specialist will be sent back or placed on hold, with a system-generated notification being sent to the cost center procurement coordinator.

- c. Requisitions are the primary means of written communication between the departments and kNEXT. 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 kNEXT sufficiently in advance of the need for the goods and/or services in order to permit adherence to normal procurement procedures.
 - v. Select accurate spend categories. Ledger accounts are linked to the categories and cannot be changed on the procurement related documents.
 - vi. Use the internal memo or memo to supplier fields 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. Internal memo field does not print on the purchase order and is not visible to the supplier. Memo to supplier field is visible to the supplier and prints on the purchase order.
 - vii. Create separate line items if there are more than one item and they are different.
 - viii. Use only one supplier per requisition. If the supplier is not in the system, refer the supplier to the Prospective Supplier Portal to complete UCF's electronic substitute W-9 form if a US Supplier. Foreign Suppliers shall complete the forms manually and submit to their UCF contact who will then Create a Supplier Request in Workday.
 - ix. Ensure the ship to and deliver to is correct. This information should default based on your workspace in your HR profile. Deliver to is the building and room number and Ship to is the mailing address of the building. Use the Alternate Address process to ship to non-UCF locations as approved by a supervisor (ie remote work).
 - x. OOR approval is accomplished through workflow routing. Using grant worktags will route requisitions to the award contract owner (grant) if the spend category is equipment and over \$5,000 or consulting services and over \$10,000.
 - xi. Approvers cannot make changes to a requisition. If additional information is required, the requisition should be sent back to the appropriate staff in the approval workflow.
1. 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 of which is 1 year or more. Property assets also include 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 that 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 an equipment expenditure. Financial Affairs is the final authority for

determination of equipment versus 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 Workday, or review previous contracts.
 - b. Whenever the sum of the anticipated contract's initial term and all renewals exceeds the \$150,000 threshold, a formal solicitation is required through Procurement Services unless exempt from competition by university regulation.
 - i. Example 1: Yearly cost for a particular service is \$51,000 and the user wants a three-year agreement where the total aggregate cost is \$151,000—a formal solicitation or exemption from competition is required.
 - ii. Example 2: Yearly cost for a particular service is \$35,000 and the user wants a four-year agreement where the total aggregate cost is \$140,000—a formal solicitation is not required; 3 formal quotes are necessary.
 - iii. Example 3: Yearly cost for a particular service is \$145,000 and the user intends a single-year agreement without any renewals—does not require a formal solicitation; 3 formal quotes are necessary.
2. Departments may obtain cost estimates from catalogs, prior orders, or suppliers. When securing suppliers' estimates, requestors should be careful to avoid the impression that they are asking for an official bid or placing an order. Estimates or quotations in excess of \$150,000 will require guidance from Procurement Services before obtaining additional estimates.
3. Procurement Services 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; however, the risk that the vendor will not provide the agreed-upon goods or services at acceptable standards of quality and timeliness must be considered prior to any prepayment. For advanced payment procedures please see Vendors Payable Business Process

Examples of items and services that may require advance payments include:

- Operating capital for a specialized piece of equipment
- Catering agreements
- License agreements (e.g., software approved through UCF IT)
- Monthly rent or lease payments

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

- A continuous need for the maintenance or service of a research project
- A mission-critical need of the department
- Customized equipment or furnishings
- Other (justification provided by the requesting department)

Services that are strictly prohibited from prepayments include:

- Professional services, including but not limited to, consulting, and accounting services
- Internal UCF charges, other than monthly contracts (e.g., advance payment for next month's copier lease is allowable, but not prepayment for next FY's lease)
- Any expenditure intended to expend current year operating budget prior to fiscal year close

Advance payment invoices will be processed according to the following procedure:

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 advance payment by Financial Affairs if the prepayment terms are documented on the invoice or other agreement between the university and the payee. The advance payments must meet the above listed criteria. Contact the Assistant Vice President of Tax, Payables and Procurement with questions related to prepayment approvals.

For research projects requesting an advance payment, Financial Affairs will consider the prepayment approved after review and approval by the Office of Research.

Any exceptions to this procedure must be approved in writing in advance of the purchase by the Assistant Vice President for Tax, Payables, and Procurement.

H. Reimbursement for Expenses Other Than Travel

UCF employees may be reimbursed 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 Procurement Services (e.g., purchase of books or 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 purchased through Procurement Services or an Expense Card.

UCF departments incur additional expenses due to UCF employees using personal funds to procure commodities and services and then submitting an expense report for reimbursement. Note that purchases through official channels (Procurement Services or Expense Card) are tax exempt, while suppliers charge taxes to employees who use 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. Expense Card and requests through Procurement Services are approved by expedited methods to fulfill requirements. Expense Reports for reimbursement of non-travel expenses are routed to kNEXT for review and approval.

I. Memberships

Membership payments shall be made via Expense Card and only as a last resort by submitting an online requisition to Procurement Services. The responsibility for accurate and appropriate processing of the membership rests with the requesting 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 Expense Card as long as they are not set up as automatic payments. The originating department must renew and pay the membership annually, as needed. Contact the CardPro office if you have any questions or need further assistance.

J. **Magazine Subscriptions**

Magazine subscriptions (new and renewals) shall be purchased via Expense Card directly from the respective publisher. The responsibility for accurate and appropriate processing of the subscription and commensurate delivery rests with the requesting 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.

IV. **PURCHASE ORDERS**

A. **Purchase Orders**

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

B. **Change Orders**

1. A change order is required to:
 - a. Increase purchase order quantities or price,
 - b. Substitute comparable acceptable items for those on the original purchase order,
 - c. Make any substantial changes to a purchase order that will result in a cost differential, or
 - d. Terminate the purchase order.
 - e. Change worktags
2. Departments can initiate the requests for change orders through their Finance Business Center. Changes are made directly on the purchase order, selecting the reason for the change.
3. Unless otherwise authorized by the PO or contract, change orders are not valid until the supplier has accepted the terms therein.
4. Requests for change orders should not be submitted for the following transactions, since kNEXT 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.
5. Change Orders for purchase orders issued from a punchout need to be communicated directly with the supplier prior to the change order being completed in Workday.

C. **Blanket Orders**

1. A blanket order is a simplified method of filling urgent needs for small quantities of supplies or services by establishing open accounts with qualified suppliers. 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 value commodities and services as requested by the issuing department. This order cannot exceed \$150,000 unless pricing is based on an existing bid or contract. Competition requirements apply to blankets.
 - b. Blanket Maintenance Order: Authorizes the supplier 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 supplier.
2. Limitation on Use: Blanket orders may not be used for the purchase of taggable/asset items or prohibited purchases. Blanket orders may also not be used with trackable spend categories.
 3. Funds Increase/Decrease: The encumbrance of a blanket may be increased or decreased by submitting a change order on the purchase order.
 4. Cancellation of Order: The order may be cancelled by the Procurement Coordinator at a Finance Business Center or by the Procurement Specialist at kNEXT. The order may be terminated by Procurement Services for misuse or failure to follow established policies or procedures.

D. Unauthorized Procurement Actions (UPAs)

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

All purchases shall be in compliance with the provisions of [UCF Regulation 7.130](#) and [UCF Policy 2-107.7](#). Departments may only place orders with a supplier after completion of the appropriate procurement process (issued PO, bilateral agreement/contract, verbal notice to proceed from Procurement Services, expense card order, etc.). Also, contracts should not be signed until all procurement actions are in place (competition, approved competition exemptions, approved justifications, etc.). For procurements under a bilateral agreement/contract or prior verbal approval from Procurement Services, the requisition to process the associated purchase order must be submitted within thirty days of delivery of the commodities or the obligation for contractual services or licenses being incurred.

Violations of these rules lead to unauthorized procurement actions (UPAs). If a department commits a UPA, the UPA form must be completed by the department and signed by the college or unit's dean or vice president. The completed form must be included with the requisition or contract associated for approval purposes. The violator must also complete the [Unauthorized Procurement Action \(UPA\) course](#) in Workday and pass the course with a score of 80% or higher.

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: \$500 fine assessed against the department or unit
3. Third and subsequent violation: \$1,000 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.

UPAs can be avoided by ensuring a requisition or bilateral agreement/contract is in place with the appropriate procurement process before placing an order or incurring an obligation for services. Use an expense card where possible to expedite purchases. Contact Procurement Services for assistance with large, time-sensitive, or emergency purchases.

V. SUPPLIERS

To ensure suppliers are compliant with the federal and university standards, kNEXT evaluates suppliers that departments wish to do business with before adding them to Workday. kNEXT processes both corporate suppliers with an Employer Identification Number (EIN) and individual suppliers with a Social Security Number (SSN). This includes updates to supplier information and banking setup.

The “Travel, Expenses and Procurement” page on the kNEXT website contains information on the supplier input process for both domestic and foreign suppliers as well as relevant forms. The steps below outline the supplier input process. Please allow 24 to 48 business hours for kNEXT to process any supplier requests.

1. The requesting department refers the supplier to the Prospective Supplier portal to complete the substitute W-9 OR submits a Supplier Request through Workday with the supplier’s completed W-9.
2. For individual suppliers, the department must also complete the [Worker Classification Questionnaire](#) and submit a PDF copy of the results to kNEXT to determine how the supplier will be paid.
3. For foreign suppliers, the department must submit a W-8 BEN-E form, a quote or invoice on the supplier’s letterhead, and a foreign supplier application (Form P). The Finance Business Center shall submit a Supplier Request in Workday with all pertinent information attached. UCF Global is included in the review and approval process for foreign supplier creation. Foreign Suppliers cannot use the Prospective Supplier Portal.
4. kNEXT uses a TIN matching report to check if the supplier’s EIN or SSN is already in Workday
 - a. If the supplier is already in the system, they will need to be updated instead of creating a new supplier ID.
5. kNEXT uses the IRS TIN matching tool to ensure the supplier’s name and records match the IRS’s records.
 - a. If the supplier doesn’t match the IRS’s records, kNEXT will have the department verify that the information is correct.
6. kNEXT adds or updates the supplier’s information, including the supplier name, short name, DBA, address, email, phone, fax, website, company contact info, and EIN or SSN.
 - a. Before creating an individual supplier, kNEXT checks Workday to ensure the individual is not a current or recent employee.
 - b. Before creating a foreign supplier, kNEXT checks Visual Compliance to ensure the supplier is not a banned entity.
 - c. Before updating a supplier’s banking information, kNEXT checks with the Assistant Controller of Vendors Payable to verify the banking.
 - d. kNEXT checks three websites to see if the supplier has any minority certifications (SAM, SBA, and OSD). Any certifications are recorded under the “Supplier Classifications” field.

- e. For supplier creations, after the supplier's information is submitted, Workday will generate a supplier ID number.

Suppliers who use the Prospective Supplier Portal are notified via the portal when their application process is complete and/or if additional information is required to complete their application.

When a business center submits a Supplier Request in Workday, the business center is notified when the supplier is created.

VI. COMPETITIVE SOLICITATIONS

A. Quotes

1. Purchases between \$25,000.01 and \$150,000 require the solicitation of competitive quotes. The required number and format of these quotes are based on the university's competition requirements outlined in Section 3B.
2. When two or more quotes are received, the award shall be made to the supplier offering the lowest price meeting the specifications.
3. When two or more quotes are equal with respect to price, quality, and service, preference shall be given to the quote received from a supplier with Florida as their primary business location. Failing the above, a coin flip will be used to determine the winning supplier.
4. In the event a department opts to go with one of the higher quotes received, a written approval from the department head or director is required. The written approval shall document why the higher quote is in the best interest of the university and will be annotated on the requisition.

B. Invitation to Bid (ITB)

1. Purchases totaling \$150,000.01 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 maximize full and open competition and obtain the most advantageous contract pricing. Suppliers 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. Procurement Services shall advertise any formal invitation to bid or invitation to negotiate on the State of Florida Vendor Information Portal and on the university's Procurement Services 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 bid or proposal offering the best value to UCF.
5. When multiple responses that are equal in all respects are received, the university will give preference to responses that include commodities manufactured in the state, Florida businesses, or foreign manufacturers located in the state to determine the contract award, or, if these conditions do not exist, will use toss of a coin.
6. When only one formal bid or proposal is received, Procurement Services 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 Assistant Vice President of Tax,

Payables & Procurement 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.

7. In the event that no bids are received, the Assistant Vice President of Tax, Payables & Procurement or designee shall either rebid the requirement or negotiate the purchase at the best possible price from a source determined by Procurement Services to be in the best interest of the university.
8. No purchase shall be divided or subdivided in order to circumvent the formal competitive bidding requirements.
9. 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.

C. **Invitation to Negotiate (ITN)**

In the case where an ITB is not feasible and will not result in the best value to the university, Procurement Services 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 suppliers to propose their best solution of satisfying the requirements. Examples of previous invitations to negotiate include the Bookstore Operations, Food Service Operations, Beverage Contract, Temporary Staffing Services, Software Systems, Student Shuttle Services. These contracts provided innovative and imaginative offers from suppliers who proposed methods of handling our needs in these areas. The awarded proposal is not based on price alone, but also the supplier'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 evaluators. Because of the nature of ITNs, where awards are usually heavily based on subjective evaluations by assigned evaluators, special procedures must be followed to ensure fairness and compliance with legal requirements. Evaluators 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 evaluator shall function independently of the other members, and throughout the entire evaluation process, each evaluator 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 evaluator 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 a summary of the evaluations to the final decision maker (normally a vice president or dean). This decision maker will take the evaluations into consideration (without being 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 Procurement Services 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 or 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 evaluators on the complexity of ITN procedures and the basis for following them precisely during the evaluation process.

VII. EXEMPTED PURCHASES

A. Exceptional Purchases

Purchases of commodities and contractual services exceeding \$150,000 must be made on the basis of competitive solicitations with certain exceptions. Some exceptions are described in this section, and others can be viewed on the Procurement Services website and in UCF Regulation 7.130.

B. Sole Source Purchases

1. Definition: Commodities, contractual, and constructional services exceeding \$150,000 available only from a single source.

When competition is not possible, and a UCF department must use a specific supplier, a sole source exemption may be granted. A sole source will only be approved if the item/service is unique to only one particular supplier, 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 Procurement Services 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 can deliver the commodity or service in the least amount of time (under a non-emergency situation).
- c. A UCF department claims specialized equipment can only be provided by one supplier, but there has been inadequate research to show how the department knows that there are no other suppliers 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 supplier 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 provide complete answers for **each** point listed in Part II of the Sole Source Certificate to allow for evaluation and determination of the sole source's validity. 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 Workday 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. **Departments must obtain all required signatures before submitting the form to Procurement Services.**
 - i. UCF Department Director or Chair
 - ii. UCF College President, Division Vice President, Dean or Designee
 - iii. UCF Procurement Specialist
 - iv. UCF Procurement Manager or Associate Director
 - v. UCF Assistant Vice President of Tax, Payables & Procurement or designee, who will review and provide a recommendation to approve or disapprove the sole source to:
 - vi. Senior Vice President Administration and Finance, who will either directly approve or disapprove the sole source, or, in some cases involve academic departments or 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 website for seventy-two (72) hours. Upon expiration of said posting period, Procurement Services will issue a purchase order.
 - i. Purchase orders issued using the Sole Source Certification may not be subsequently increased by change orders in amounts exceeding the competition requirements without recertification from the initiating VP/Dean. Email 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 \$150,000, a new sole source form will be required.

C. **Waiver of Competition**

Definition: Commodities, contractual, and construction services between \$25,000.01 and \$150,000 available only from a single source. Acquisitions between \$25,000.01 and \$75,000 must have informal quotes from two (2) suppliers. Acquisitions between \$75,000.01 and \$150,000 must have formal quotes from three (3) different suppliers. When competition is not possible, and the department must use a specific supplier, and the cost of the acquisition is between \$25,000.01 and \$150,000, the Assistant Vice President of Tax, Payables &

Procurement or designee 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 Procurement Services has approved a competition waiver in the past. Departments should not give a supplier a notice to proceed until the waiver is approved and a purchase order is created. Examples of circumstances that do not justify a waiver of competition are the same examples as set forth above under Sole Source Purchases.

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 Senior Vice President for Administration and Finance approves an annual certification of non-competitive purchases based on the recommendation of the Assistant Vice President of Tax, Payables & Procurement, or designee. 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 Purchases

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 the Chief Operating 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: Procurement Services (Facilities and Safety (VP for Administrative Operations, AVP for Facilities Operations or AVP for Utilities, Engineering Services) when the emergency concerns construction, real property, etc.), after determining that a true emergency exists, obtains verbal approval from the president or his or her designee (and provost when situations concern academia). A verbal notice to proceed may be issued to the supplier at that time. After the emergency has been properly resolved, the requesting department will prepare an Emergency Purchase Certification Form (which 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. Procurement Services 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 instructional or sponsored 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/her 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 website for seventy-two (72) hours. Procurement Services 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 (memo showing the president’s approval not required). Sponsored Research Exemptions shall be used in lieu of a sole source if they are authorized under F.S. 1004.22(7).

VIII. 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 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 3-302.3](#) governs all requests for printing services.

All UCF departments are required to forward their print jobs to the UCF Print Shop, even if the printing will be paid by Expense Card. If the Print Shop cannot fulfill the project, that department will then receive price quotes from printers on the approved supplier list whose equipment, production availability, delivery capability and printing expertise best match the needs of the UCF client. In addition, the Print Shop 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 the Print Shop, an academic or administrative unit chooses to use a printer other than the Print Shop or one of the approved printing companies, a written explanation must be forwarded to the Print Shop requesting a one-time waiver prior to contacting the non-contract supplier(s). Note that if problems arise concerning quality, delivery, service, or other factors related to a job printed by a supplier 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 aforementioned benefits, a major advantage of using the Print Shop is that departments utilizing the contract suppliers need not concern themselves with obtaining competitive bids. The Print Shop will facilitate competition among contract suppliers 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 requirements must be adhered to when not using the contracted suppliers: orders \$25,000.01-\$75,000 must have two written quotes, orders \$75,000.01-\$150,000 must have three quotes, and orders over \$150,000 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 Bidders

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 percent if the lowest bid is submitted by a supplier 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.

IX. 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 Procurement Services:
 - 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. Cost center from which the payment for the lease will be made;
 - d. Method by which the supplier was selected (state contract, sealed competitive bids, negotiation, or other specified method);
 - e. Appropriate documentation of compliance with other applicable law, if any;
 - f. Determination if funds were 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 maintenance costs are included in the lease payments; and
 - v. Provide 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 Financial Affairs. Please contact financialaffairs@ucf.edu for assistance, if needed.

- 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. Approval from BS shall be attached to the requisition.
- 4. Deferred Payment Contracts: Interest on deferred payment contracts is defined as a commodity, and these contracts are subject to the competition requirements if the total interest exceeds \$150,000. Deferred payment contracts meeting the following criteria require justification to demonstrate that the acquisition is economically prudent:
 - a. The deferred payment contract price exceeds \$150,000 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 \$150,000. Deferred payment commodity acquisitions not financed under the CEFP must be bid when the total cost exceeds \$150,000.

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 supplier supplying the equipment. After receipt of the equipment and acceptable installation, the department shall submit the Receipt Certificate to Procurement Services for further processing.

B. Leases: Real Property

[UCF Regulation 7.203](#) contains the authority and the procedures to be followed by the university when executing leases for real property. As set forth in the aforementioned policy, Real Estate & Space Administration must be contacted when a need exists to explore the leasing of any space off campus. Refer to [UCF Policy 3-125.1 Real Estate Transactions](#).

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. Contract renewals cannot exceed five years or twice the term of the original contract, whichever is

- longer. 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. Procurement Services 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 many commodities and services on annual contracts. Contact Procurement Services for a complete listing of current UCF annual contracts or visit the [Procurement Services 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 competition requirements.
 - b. A list of state contracts can be obtained on the [Department of Management Services website](#).
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, any independent college or university, and educational cooperatives and consortiums without further competition, as long as the original contract was the result of a competitive solicitation. Contact Procurement Services for information regarding these contracts.
6. Adopted/Piggyback Contracts: Departments can adopt/piggyback contracts awarded by other public agencies or cooperative purchasing groups. Before entering into a piggyback contract, the following requirements must be met:
- a. The adopted/piggyback contract must have been competitively solicited and publicly advertised.
 - b. The adopted/piggyback contract must be active and not expired. UCF may adopt/piggyback for the full remaining term(s), including renewals and extensions.
 - c. The adopted/piggyback contract's price, quantity, and scope of work must match the parameters of the proposed UCF contract. The scope of work must be equivalent or broad enough for use by UCF. The pricing must be the same or better than UCF's pricing.

Procurement Services makes the final decision as to whether the contract presented for adoption/piggybacking can be utilized by UCF based on all procurement policies and regulations. Departments should request a review from Procurement Services prior to

entering into a adoptable/piggyback contract to ensure that the contract can be adopted/piggybacked. After Procurement Services has vetted and approved the use of an adoptable/ piggyback contract, the department should attach the executed adopted/piggyback contract, original solicitation document, and the awarded supplier's response to the solicitation to the requisition in Workday or the contract in CobbleStone.

7. Uniform Administrative Requirements for Grants and Agreements: Recipients of awarded grants, contracts, and agreements are required to follow established and uniform administrative requirements as they pertain 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 \$150,000 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 contract must specify the price, quantity, and scope of work. An itemized price list should be included for contracts involving multiple stages or components. Be sure to include services rates.
 - f. The date for substantial (if applicable) and final completion of the contract.
 - g. 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.
 - h. 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.
 - i. Upon award of invitations to bid or invitations to negotiate, a contractual service agreement (UCF's standard for suppliers) should be completed if practical, feasible, and approved by the General Counsel and other university authorized signatory (see [UCF Policy 2-107.7](#)) prior to the rendering of any services/commodities by the contractor.

E. Personal Services

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 Procurement Services, 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 Procurement Services prior to the date services are to begin. A supplier ID must be set up in the Workday (if it does not already exist) before the requisition can be prepared. Refer the supplier to the Prospective Supplier Portal to complete UCF's Substitute W-9 or submit a Supplier Request in Workday.
 - 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 Financial Affairs for further instructions.
 - d. In addition to the above information, the requisition must also include a description of the requested services the supplier 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 payee's and the authorized official's signatures on the final invoice and submit to the respective Finance Business Center 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 boat, canoe, pontoon, kayak, waterski, jet ski, or any other vehicle 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 will occur electronically in Workday. 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, tractors or 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 a requisition in Workday. Attach the appropriate number of quotes or reference the appropriate contract used and attach a detailed specification sheet, including any optional equipment needed.
 - b. Submit a Surplus Property Board approval sheet if there is a trade-in.
 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. The Surplus Property Board approval sheet must be attached to the requisition.
 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 tag).
 - i. The dealer (or department if received in error) must send all paperwork concerning title, registration, and tag to Procurement Services. All titles and registration must use the following address:
The University of Central Florida Board of Trustees
12424 Research Parkway, Suite 355
Orlando, FL 32826
 - ii. Vehicles Purchased Out of State: the dealer must forward all paperwork concerning title, registration, and tag to Procurement Services.
 - i. Procurement Services will obtain the title, registration, and tag from the tax collector office. The department is advised of the cost and provides the cost center information so an Expense Report can be submitted for approval. Once the Expense Report is approved, the department will be able to pick up a copy of the title, registration, and/or tag.
 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 the 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. Amortization schedule for capital leases or email from Financial Affairs

- stating that it is an operational lease
 - iv. Cost Center from which the payment for the lease will be made
 - v. Method by which the supplier was selected (state contract, sealed competitive bids, negotiation, or other specified method)
 - vi. If acquisition is to be made by lease or lease purchase method
 - vii. Outright purchase price of specific piece of equipment, taking into consideration accruals
 - viii. Balance of the expected useful life of the piece of equipment
 - ix. Cost of equipment maintenance and whether maintenance costs are included in the lease payments
8. Procedures for Vehicles Donated or Transferred: The university must comply with Section 320.0609(2), F.S. (Notification of Transfer of Registration License Plate).
- a. The donor must sign the title over to UCF, not to an individual.
 - b. The donor must prepare a letter on official letterhead describing the vehicle, including the VIN, original purchase price, estimated current value, and mileage. The letter must include the donor's address, printed name, and original signature. Copies will not be accepted.
 - c. The donor must complete a Gift-in-Kind form from UCF Foundation. The form must first be submitted to UCF Foundation for approval and signed by all responsible parties. Procurement Services cannot accept forms that are incomplete or missing signatures.
 - d. The department must send the title, donor letter, and Gift-in-Kind form to Procurement Services.
 - e. Procurement Services will obtain the title, registration, and tag from the tax collector office. The department will be notified of transaction's cost and will create an Expense Report with the departments cost center. Once the Expense Reports is approved, the department will be able to pick up a copy of the title, registration, and/or tag.
9. Procedures for Lost, Stolen, or Damaged Tags:
- a. The department is to notify Procurement Services with the tag number, vehicle identification number (VIN), department name, and if the tag was lost, stolen, or damaged.
 - b. Procurement Services will obtain the replacement tag from the tax collector office. The department is advised of the cost and provides the cost center information so an Expense Report can be submitted for approval. Once the Expense Report is approved, the department will be able to pick up a copy of the new license tag.
10. Procedures for Club Cars: The university only allows electric club cars on campus (vehicles that travel under 35 MPH).
- c. Complete a requisition in Workday. Reference the contract number or attach the appropriate number of quotes and a detailed specification sheet, including any optional equipment needed.
 - d. 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 Procurement Services.
 - ii. Procurement Services will obtain the title, registration, and tag from the tax collector office. The department is advised of the cost and provides the cost center information so an Expense Report can be submitted for approval. Once the Expense Report is approved, the department will be able to pick up a copy of the new title, registration, and/or tag.

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

properties.

11. Procedures for Aircraft:
 - a. The Department of Security and Emergency Management manages approvals for flights of drones on university property. See [Drone Flight Procedure](#). Appropriate levels of insurance are required and must be evidenced by a Certificate of Insurance. A flight request form must be completed as well. Please contact Security and Emergency Management for more information.
12. Procedure for a Watercraft/Vessel:
 - a. Complete a requisition in Workday. Reference the contract number or attach appropriate number of quotes and a detailed specification sheet, including any optional equipment needed. If not using a state contract, please acquire written quotes as per the competition requirements.
 - b. Once the watercraft has been purchased, it must be registered and titled within 30 days of purchase. The dealer (or department if received in error) must send all paperwork including the original Manufacturer Certificate of Origin (MCO).
 - c. Please be aware that some counties have an additional “optional county fee.” Please state which Florida county the watercraft will be used in or stored.
 - d. Procurement Services will obtain the title, registration, and tag from the tax collector office. is advised of the cost and provides the cost center information so an Expense Report can be submitted for approval. Once the Expense Report is approved, the department will be able to pick up a copy of the new title, registration, and/or tag.
 - e. Vessel registrations are not permanent; they must be renewed annually.
13. Procedure for a Trailer:
 - a. Follow the same procedures as a car.
 - b. Trailers under 2,000 lbs. need a yellow state license plate.
 - c. Trailers over 2,000 lbs. need a title and a yellow state license plate.
14. Procedure for a Motorcycle:
 - a. Follow the same procedures as a car.
 - b. A non-alternative fuel vehicle form is not necessary.
15. Procedure for an ATV/two-rider, ATV/off-highway, Vehicle/off-highway Motorcycle:
 - a. Follow the same procedure as a car.
 - b. A non-alternative fuel vehicle form is not necessary.
16. Auto Insurance Policy Documents:
 - a. The insurance policy can be downloaded from the [University Compliance, Ethics, and Risk Office website](#).
 - i. All vehicles should have an annually updated copy of this policy at all times as well as a copy of the registration.
17. Vehicle Document Signatures:
 - a. Documents related to a vehicle’s registration and title shall be signed by Procurement Services management. This includes the vehicle power of attorney, title application, title reassignment, title replacement, and tag replacement forms. These forms should be signed by Procurement Services even if the vehicle dealership is the one processing the registration and title paperwork at the DMV.
 - b. All other documents related to the purchase of a vehicle shall be signed by the department purchasing the vehicle, including but not limited to the vehicle sales agreement, air pollution control statement, lemon law disclosure, odometer disclosure statement, insurance affidavit, and sales dispute resolution agreement.

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 a requisition in Workday 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 and Safety 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 Expense Card. Purchase orders must be used. The Procurement Card can be used as the payment method on the purchase order.
- 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 Environmental Health and Safety 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 Environmental Health and Safety must register the materials with the Federal Centers for Disease Control.
- c. Requisitions for explosives, radioactive materials, tax-free alcohol, and select agents must be approved by Environmental Health and Safety.. Departments are required to choose the appropriate spend category when creating a requisition. Workflow in Workday will route the requisition to Environmental Health and Safety as part of the approval process..

- d. Environmental Health and Safety 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
3512 Perseus Loop
Building 48, LES Room 109
Orlando, FL 32816-3500
- 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 a UCF Expense Card is prohibited. In addition, Environmental Health and Safety must approve in advance any purchase orders for machines that produce iodizing 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 Environmental Health and 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 (including low-speed vehicles) and trailers;
 - b. Physical damage to property owned, leased, or loaned to or by the university;
 - c. Theft and direct physical losses to scientific, medical, and IT equipment;
 - d. Damage or loss as a result of equipment breakdown of mechanical or electrical equipment (e.g. boilers, chillers, etc.);
 - e. Loss or damage to indoor fine art and other sculptures;
 - f. General liability coverage;
 - g. Camp accident and sickness insurance.
2. Deductible: Each policy purchased by the Office of Enterprise Risk and Insurance will be subject to the deductible outlined in the specific policy
3. Requests for New Policies: Per the university's policy on insurance found here, all insurance policies must be procured and administered by the Office of Enterprise Risk and Insurance. Requests for new or additional insurance coverage should be submitted to the Office of Enterprise Risk and Insurance. This guidance does not apply to supplemental employee benefit insurance.
4. Premiums: Invoices for premiums to be paid from state or student activity funds will be reviewed by the Office of Enterprise Risk and Insurance 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:
6. Student Government: Involved in the selection of the student health insurance plan and acts as a liaison with the insurance broker and underwriter.
7. Director of Human Resources: Worker's Compensation, Employee's Group Health Insurance, Unemployment Compensation, Supplemental Employee Benefit Insurance and Annuities.
8. Enterprise Risk and Insurance (riskmanagement@ucf.edu): All other insurance types.

9. 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 could 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 sections in commercial newspapers should be placed by departments using the university Expense Card. Submit a requisition to Procurement Services only when the desired media will not accept an Expense Card.
2. Departments can also place employment ads in Career Builder by coordinating with the UCF Human Resources Department.

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 suppliers for flexibility in the selection of dimension and style.
2. Maximum Allowable Prices for Seating: Departments may purchase chairs from any supplier; 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) chairs: \$800. Requests to exceed these amounts are reviewed on a case by case basis and approved by Assistant Vice President of Tax, Payables and Procurement.
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. Moving expenses are governed by [UCF Policy 3-505.3](#). Relocation stipends up to 10% of a new employee's salary are considered perquisites and require approval by the appropriate vice president, provost, or designee. Relocation stipends over 10% of an employee's salary require advance approval by the president. The approval of relocation stipends is not automatic and is granted only when it is determined that the expense is in the best interest of the university. Please contact Human Resources for more information.
2. Laboratory and office moves are processed through Procurement Services via requisition. Requests to move laboratory equipment and professional books should be submitted on a requisition with quotes attached. Please review UCF's competition

requirements to determine the correct number of quotes needed.

M. **Hotel Accommodations**

The [Procurement Services website](#) has an annually updated list of suppliers that offer lower rates to the university than to commercial customers. This list is provided as a guide for locating hotels near the university. The university does not have a contractual relationship with these hotels, nor does this list represent an endorsement from UCF. The rates and information may change at any time at the hotels' discretion.

N. **Renovation and Alteration Projects**

1. Definitions:

- a. **Minor Projects:** Includes repairing, remodeling, renovating, improving and demolishing any public facility. These projects are not to exceed \$4,000,000. All projects must have prior approval by Space Administration (SA) and PDC before work can begin. The projects may require building permits and approval by the State Fire Marshall's office prior to commencement.
 - b. **Minor Projects using Continuing Contract Agreements:** Projects whose construction cost is estimated to be \$4,000,000 or less using vendors selected by public processes in compliance with Florida Statutes and Board of Governors Regulations.
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 \$200,000 or less shall not require a payment/performance bond.
 3. **Responsibilities:** The Planning Design and Construction (PDC) department is responsible for the planning, design and construction of all projects, in accordance with UCF Policy 3-114 "New Construction, Remodeling, and Renovation Projects."

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 HR Compensation Section for more information concerning the approval process. HR will forward to the department, Procurement Services, and Financial Affairs a copy of the perquisite form with the referenced approval number. The 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:

Commodity/Service	Approval Agency/Unit
Information Technology Resources	UCF Board of Trustees (Over \$500,000)
All Communications Equipment	Division of Telecommunications (as appropriate)
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 UCF IT vice president and CIO must approve all information technology resource acquisitions over \$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 Procurement Services. The exception is that all wired and wireless network equipment regardless of the dollar amount must be processed by the UCF IT Telecommunications department for review and approval to ensure interoperability with the university's network.
 - a. Customers completing a TPC or purchase requisition must submit the electronic IRR form with associated equipment specifications through the UCF IT Support Center (ServiceNow) for approval. Requisitions over \$150,000 require vice president approval in addition to the IRR form. The form will be processed and returned within one working day if no additional information is needed.
 - b. It is recommended that departments contact the TPC 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 RITM number from the IRR ServiceNow ticket must 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 RITM number on the change order.

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)
- b. 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.
- c. 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 UCF Telecommunications prior to submitting the requisition to Procurement Services. 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 supplier name and address. If Procurement Services receives requisitions for communications services and/or equipment without UCF Telecommunications' indicated approval, they will be forwarded by Procurement Services to Telecommunications for such approval.

For all other communications equipment, include the complete specifications, make and model, number of item(s), pricing (if known), suggested suppliers, and any other information related to the request. If assistance is needed in preparing specifications for formal bids, contact Procurement Services. 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 on the Procurement Services website.
2. Procedures:
 - d. Price quotes shall be requested from only the awarded suppliers. 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

- e. Request for quotes from departments to the suppliers 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., one week, four months, etc.).
 - iii. Location of assignment (physical work location).
 - iv. Hours of work (i.e. 8:00 a.m.–5:00 p.m. Monday–Friday).
 - f. Unless the need is urgent, provide each supplier three to five business days to respond to your request for quote by submitting their hourly bill rates and applicants’ resumes (if applicable).
 - g. Select the supplier based on the results of department’s quote request.
 - h. 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 Department 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 of specialized/high-level placements.

X. 10. 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 Workday. Where remote work is approved, shipping to a home location is permissible, as approved by the supervisor.
- 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 Memo to Supplier or Internal Memo field of the requisition in Workday.
 - iii. Packages will be inspected for obvious physical damage and quantities will be verified, after which they will be 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. Goods or services received directly from a supplier, the receiving department must promptly ensure that shipment is correct and goods were not damaged. Receiving is required on the purchase order by the requisition requestor or cost center procurement coordinator.
 - ii. If suppliers fail to meet the delivery date specified on the purchase order, the department should contact the supplier directly. Where repeated failures to deliver on time occur, please contact Procurement Services.
- 3. Receiving Blanket Agreement Orders: Receiving for blanket POs is required and done by the requisition requestor or cost center procurement coordinator.
 - 4. 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.

XI. 11. PROTEST/DEBARMENT

A. Authority to Resolve Protests

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) hours after such time bidder knows or should have known the facts giving rise thereto.
2. The Assistant Vice President of Tax, Payables & Procurement or designee 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 acontract.

If the protest is not resolved by mutual agreement by the supplier and the Assistant Vice President of Tax, Payables & Procurement or designee, 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 Suppliers

The Senior Vice President for Administration and Finance or designee shall be authorized to suspend or debar suppliers 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 Regulation 7.124.

XII. 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, (SMWVBE) by UCF departments. SMWVBEs 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 business based in this state that 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, gender makeup, or national origin which has been subjected historically to disparate treatment due to identification in and with that group resulting in an underrepresentation 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 SMWVBE Agencies

Procurement Services provides electronic notices of all advertised formal solicitations for contractual services, supplies, and commodities to its SMWVBE 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 SMWVBEs are located and given an opportunity to respond.

D. Supplier Development

In order to assist Procurement Services with the administration of the Diversity in Contracts program, the cooperation and assistance of each department is required. Some suggested ways of assisting are as follows:

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

Associate Director to add to your selection list.

E. SMWVBE Directories

A listing of state certified minority and small businesses can be found on the [Office of Supplier Diversity website](#). Contact the Diversity in Contracts Associate Director at Procurement Services for an extensive search of qualified SMWVBE suppliers.

F. Diversity in Contracts Associate Director

This individual is charged with the responsibility of seeking out and encouraging increased SMWVBE 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 SMWVBEs 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 SMWVBEs and the university.

XIII. 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 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-ins

Please see the Financial Affairs [Property Accountability and Inventory Control manual](#) and the Resource Management [UCF Surplus Property website](#) for more information.

D. UCF Property Control Regulations

Property control regulations can be found in [UCF Regulation 4.007](#).