NUMBER: 1627

TITLE: Procurement Reporting Exemption

APPROVED: September 9, 2005; Revised June 17, 2010

I. Background

The 2005 General Assembly session passed HB 2866 and SB 1327 to establish the Restructured Higher Education Financial and Administrative Operations Act. This Act allows public institutions of higher education restructured financial and operational authority as described in subdivisions A1 through A13 of Section 23-38.88 of the Act.

Pursuant to §23-38.88, *Eligibility for Restructured Financial and Administrative Operational Authority*, subdivision A12 states that for a public institution of higher education to be exempt from reporting its purchases to the Secretary of Education, the Board of Visitors shall establish policies and procedures that provide for compliance with the Commonwealth's Purchasing Program Standards for Electronic Procurement.

II. Board of Visitors Policy

It is the policy of the Board of Visitors for Old Dominion University to utilize eVA as its primary procurement tool, supplemented by the small purchase charge card, including receipt of requisitions, source for quotes via Quick Quote, Invitation for Bids and Request for Proposals when available, and shall award all contracts in eVA in compliance with the Commonwealth of Virginia objectives.

III. Authority

The Vice President for Administration and Finance or the Vice President's designee shall be responsible for interpretation, implementation and compliance of this policy. The Vice President for Administration and Finance may delegate this authority by letter.

IV. Procedures

A. Business Rules

1. All procurement transactions $5,000 or greater shall be entered into eVA.

2. Transactions under $5,000 may be processed via petty cash (up to $200), small purchase charge card (SPCC), LPOs (for non-contract items), or eVA.

3. LPO authorization may be granted by Materiel Management for remote users, or users with a limited number of transactions per month.

4. SPCC authorization in excess of $5,000 may be granted by Materiel Management for special needs as petitioned by University departments after approval from the Department of Accounts (DOA).

5. eVA users are authorized to utilize SPCC up to $5,000 per procurement.

6. QuickQuote shall be utilized for all procurements in excess of $5,000 and shall be encouraged below $5,000 to increase competition and potential SWAM spend.

7. Materiel Management shall have authority to award contracts to SWAM vendors up to $10,000 if prices/fees are fair and reasonable.

8. eVA eProcurement tools shall be utilized for all procurements in excess of $50,000.

9. Materiel Management shall use new eProcurement tools as they are made available and shall cooperate with the Department of General Services (DGS) in development, enhancement and/or pilot programs to support improvement of eVA.

10. Quarterly spend reports shall be generated by the Executive Director of Construction and Procurement Services and submitted to the Department of Minority Business Enterprise (DMBE).

B. Exemptions

Old Dominion University recognizes the exempt categories as defined by Department of General Services in the Agency Procurement and Surplus Property Manual, Section 14.9.b.

C. Procurement Procedures for Materiel Management (Centralized Purchasing Officers) are as follows:

1. <u>Contract Purchases</u> (ODU, VASCUPP and VaPP/State Contracts)

a. Orders may be issued using:

(1) SPCC up to cardholder's transaction limit.

(2) eVA Requisition *(contract number <u>must</u> be referenced in contract number field)*. Orders for more than $100,000 will automatically be forwarded to Materiel Management via eVA for review/ approval.

b. Links to available contracts

(1) http://www.odu.edu/af/materiel/contracts/ (ODU Contracts)

(2) https://vascupp.cs.odu.edu/contracts.php (VASCUPP)

(2) http://www.eva.state.va.us/Contracts/contracts.htm (State Contracts)

2. Non-Contract Purchases – only to be used when a contract is not available

a. SPCC - $0 to $5,000 *(not required to be entered in eVA)*

Obtain one quote, utilizing SWAM vendors to the maximum extent practicable. *(SWAM means small, woman and minority owned businesses as adopted by Executive Order 29 and certified by the Department of Minority Business Enterprises.)*

b. eVA- $0 to $5,000

Obtain one quote from an eVA registered vendor, utilizing SWAM vendors to the maximum extent practicable. Link to DGS commodity codes website – http://www.eva.state.va.us/NIGPCodes/NIGPCodes.htm

c eVA Quick Quote - $5,000 to $50,000

(1) Orders for more than $5,000 will automatically be forwarded to Materiel Management via eVA for review/approval.

(2) Purchasing Officers may not de-select a small, minority or woman-owned business from the bidder list generated by eVA.

d. Sole Source - Sole source procurements shall be purchases for which only one source is practicably available.

(1) Orders may be issued using:

a) eVA Requisition - Orders for more than $5,000 will automatically be forwarded to Materiel Management via eVA for approval and shall have sole source justification form electronically attached. Link to sole source form on Materiel Management webpage under Forms or http://www.odu.edu/webroot/orgs/af/mm/materielmanagement.nsf/files/SOLE_SOURCE_REQUEST_FORM_12-04.pdf/$FILE/SOLE_SOURCE_REQUEST_FORM_12-04.pdf

b) SPCC up to cardholder's transaction limit. Justification shall be attached to the cardholder's copy of the monthly log.

e. Emergency - Emergency purchases occur when an immediate purchase is required to protect life, safety or property, to prevent substantial economic loss or prevent interruption of services.

1. Orders may be issued using

a) eVA Requisition - Orders for more than $5,000 will automatically be forwarded to Materiel Management via eVA for review/approval and shall have emergency justification form electronically attached. Link to emergency form on Materiel Management webpage under Forms or http://www.odu.edu/af/materiel/forms/EmergencyProcurementForm.pdf.

b) SPCC up to cardholder's transaction limit. Justification shall be attached to the cardholder's copy of the monthly log.