

Procurement and Contracts FAQ

FAQ Summary:

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- 2) How does the bidding process work and what documents do I use for this?
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- 5) How do I know which contract document to use for the goods or services I wish to procure?
- 6) How does Cobblestone (UCF's contract management system) fit into the procurement process?

1) When do goods or services have to be bid?

If your procurement exceeds \$75,000 and no exemption applies (for exemptions see below), the procurement of goods or services will be subject to the competitive solicitation process.

2) How does the bidding process work and what documents do I use for this?

A. Invitation to Bid (ITB)

An ITB is a formal solicitation process through Procurement Services. It is used when detailed specifications are written for a specific product or service and the requirements are outlined to the point suppliers can bid on these. ITBs are awarded to the least expensive, responsive, and responsible bidder meeting specifications. The ITB template is available on the Procurement Services website. Requesting departments are responsible for developing specifications/requirements, providing a list of known suppliers with contact information, then reviewing and approving the bid tabulation with the Procurement Specialist to determine the lowest responsive and responsible bidder. Cycle time for this process can take 10-60 days depending on the urgency and complexity of the products or services.

For more detailed information, please view the Procurement Services Manual at: https://procurement.ucf.edu/wp-content/uploads/sites/3/2016/09/PurchasingManual_090816.pdf

B. Invitation to Negotiate (ITN)

An ITN is a formal solicitation process through Procurement Services. It is the preferred method for complex procurements where specifications are not clearly defined, relying on the suppliers to propose their best solution of satisfying the requirements. ITNs are awarded to the proposer whose offer is in the best interest of the university. The ITN template is available on the Procurement Services website. Requesting departments are responsible for developing specifications/requirements and providing a list of known suppliers with contact information. A decision-maker and a committee will be appointed to review all submitted proposals.

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3) When is the procurement of goods or services exempt from bidding?

Some exceptions/exemptions from the bidding requirement for the procurement of goods or services exceeding \$75,000 are described in this section and others can be viewed on the Procurement Services website and UCF Regulation 7.130 Administration and Finance; Procurement.

A. Sole Source Procurements—these are for procurements of goods or services exceeding \$75,000 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. A sole source shall not be used to avoid competition. Multi-level approvals are required. If approved, Procurement Services will post the sole source publicly on the Procurement Services website and in the Procurement Services office for 72 hours (3 business days). The sole source certification form is available on the Procurement Services website.

B. Waiver of Competition—these are for procurement of goods or services between \$10,000.01 and \$75,000 available only from a single source.

Acquisitions between \$10,000.01 and \$35,000 must have informal quotes from two (2) suppliers. Acquisitions between \$35,000.01 and \$75,000 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 \$10,000.01 and \$75,000, the Procurement Services Director may grant a waiver of competition, if all the requirements for this waiver have been met by the requester. A waiver of competition shall not be used to avoid competition. The waiver of competition form is available on the Procurement Services website.

C. Annual Certification of Procurements

The Vice President for Administration and Finance approves an annual certification of non-competitive procurements based on the recommendation of the Procurement Services Director. These are commodities and/or services procured 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 and is available on the Procurement Services website.

D. Emergency Procurements

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 procurement without a competitive solicitation. The emergency procurement shall be limited to the procurement 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.

E. Sponsored Research Exemption

Procurements for sponsored research projects are handled in accordance with Section 1004.22(7), Florida Statutes 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 research purposes from the general purchasing requirement of the Florida Statute."

For more details on 3(A-E), please view the Procurement Services Manual at: https://procurement.ucf.edu/wp-content/uploads/sites/3/2016/09/PurchasingManual_090816.pdf

4) What if my procurement does not exceed \$10,000?

A procurement under \$10,000 does not require quotes; however, competition is encouraged.

5) How do I know which contract document to use for the goods or services I wish to procure?

If you have any questions regarding which contract would best fit your procurement, please contact the Office of the General Counsel at contracts@ucf.edu and we can assist you. We also have several templates available for specific types of agreements.

6) How does CobbleStone (UCF's contract management system) fit into the procurement process?

Any agreement, quotes, or terms/conditions that require a signature from the University of Central Florida must be placed into the CobbleStone contract management system managed by the Office of the General Counsel. The Office of the General Counsel will seek signatures from both the UCF signatory and the supplier. Once the applicable document(s) are reviewed and proper signatures obtained, the fully executed document(s) and/or the CobbleStone ID number should be attached to the requisition in PeopleSoft before a purchase order is issued. Interested people can sign up for CobbleStone training through myUCF which will populate a Webcourse. For more information contact contracts@ucf.edu; CobbleStone can be accessed via myUCF or at <https://contracts.aa.ucf.edu>.