



# THE UNIVERSITY OF OKLAHOMA PURCHASING DEPARTMENT

## Purchasing Policies and Procedures

Presented by:  
Nathan Baird, C.P.O.  
Acquisitions Manager  
Purchasing Department

# What is the University of Oklahoma?

The University of Oklahoma is a constitutionally created state agency.

(Article XIII, § 8, Oklahoma Constitution)

The official governing body of the University is the Board of Regents, composed of seven citizens appointed by the Governor with the advice and consent of the State Senate.

# What does this all mean?

As an institution of Higher Education, we are exempt from the State Purchasing Act.

(Okla. Stat. tit. 74, 74-85.3A)



Our purchasing policies and procedures are derived from The Regents' Policy Manual. (Section 4.11)

<http://www.ou.edu/regents/CurrentPolicyManual.pdf>

# Who do we buy for?



This office procures products and services for the University as a whole.

- Health Sciences Center - Oklahoma City
- Main Campus - Norman
- Schusterman Campus - Tulsa
- Several Satellite Locations throughout Oklahoma

# What do we buy?

Purchases are made to support academic and research programs as well as support activities, such as Athletics, Facilities/Site Support, Housing and Food Services, etc.

Purchases for all three campuses total over a billion dollars yearly. Items include scientific equipment, furniture, chemicals, medical supplies, repair and construction, machinery, and services.

# Small Dollar Policy

- ▶ Unless otherwise governed, restricted, or addressed by University policy, University departments may purchase products and services directly from a vendor when the cost of the acquisition is \$5,000 or less (small dollar purchases). You may not split orders in order to stay below the limit and avoid generating a purchase requisition to the Purchasing Department.
- ▶ Desktops and Laptops running a full “desktop OS.” Departments must use the designated PC or Apple catalog from IT. You must contact IT for any exceptions to this policy.

# When does Purchasing become involved?

According to Regents' Policy (Section 4.11.3)

Generally, the dollar amount of a purchase determines whether it must be processed through the Purchasing Department. The dollar limitations are on a per-transaction basis and are not cumulative. However, certain purchases, regardless of dollar amount, must be processed through the Purchasing Department:

- ▶ Leases
- ▶ Use Licenses (such as for software, intellectual property)
- ▶ Services
- ▶ Purchases involving radioactivity or animals

# How do we buy? Part 1

Purchases between \$5,000 and \$50,000

- ▶ These purchases are processed competitively, Request for Quote(RFQ).
- ▶ We require prompt response, and can be paid off a purchase order or Procurement Card (Pcard). Usually a three day solicitation.



# How do we buy? Part 2

Purchases over \$50,000

- ▶ These purchases (unless covered by a contract) are competitively bid by formal solicitation, (e.g., Invitation to Bid (ITB) or Request for Proposal (RFP)).
- ▶ Documents can be downloaded and completed. We award on best value to the University, using factors such as technical experience, history, customer references, bid responsiveness, quality, and life cycle costing.

# How do we buy? Part 3

## Purchases from a Sole Source

- ▶ A sole source procurement is any acquisition which, by the specifications needed by the requestor or by the clear and specific restrictions imposed by a funds provider, restricts the contract to one vendor or to one brand.

The Purchasing Department can skip the competition process if there is a sole source justification form and place the order.

# How do we buy? Part 4

- ▶ Contracts that have been established may be used in lieu of competition.

State Contracts -

<https://www.ok.gov/dcs/solicit/app/contractSearch.php>

Cooperatives - E&I and BuyBoard

<https://www.eandi.org/Default.aspx>

<https://app.buyboard.com/Login.aspx?ReturnUrl=%2f>

OU Contracts -

<http://www.ou.edu/purchasing/contracts/index.htm>

# Regents' Reporting and Approval

- ▶ Purchases between \$50,000 - \$1,000,000 must be reported to the Regents on a quarterly basis.
- ▶ Purchases over \$1,000,000 must be approved by the Regents' before the issuance of a purchase order and/or contract. Meetings occur about 7 times a year.

# Other Approvals

- ▶ Some product and services require other approvals from specialized departments
- ▶ Examples are:
  - ▶ Advertising - Public Affairs
  - ▶ Animal Orders - Comparative Medicine
  - ▶ Facility Maintenance Repair - Facilities Management/Site Support/Operations
  - ▶ Insurance - Risk Management
  - ▶ Radiation - Radiation Safety Committee
  - ▶ Sponsored Funds/Sub-Contracts - Grants Accounting/ORA
  - ▶ Technology (Hardware/Software) - IT

# Signature Authority

- ▶ Under Regents' Policy 4.10
  - ▶ The Board of Regents grants to the President the power to delegate such signature authority to appropriate University executives, officers and directors.
  - ▶ All Purchasing personnel (Directors, Managers and Buyers) have such authority.
  - ▶ Exceptions to what we cannot sign:
    - ▶ Revenue generating contracts
    - ▶ Applications for Grants
    - ▶ Letters of Agreement, Memoranda of Agreement, Cooperative Agreements, Teaming Agreements, etc...

# Questions?

# Contact Information

[Nathan-Baird@ouhsc.edu](mailto:Nathan-Baird@ouhsc.edu)

(405) 271-8001 X-44471

(405) 271-1725 Purchasing Mainline