Agenda

- Overview of the federal regulation enacted December, 2017
- Highlights of OUHSC policy and procedure revisions (to mirror Uniform Guidance) State procurement policy vs. federal requirements – are they the same?
- Discussion on changes most impactful to grant/federally funded purchases
- What is the practical application for these new requirements? Review of a typical requisition and mandatory considerations for each purchase.
Discussion

- 2 CFR 200 – Uniform Requirements, Cost Principles, and Audit Requirements for Federal Awards (Uniform Guidance)
  - Governs purchases funded by federal awards
  - Dollar thresholds determine if competition is required and type of solicitation (informal, formal)
  - Inclusion of Small and Minority Owned Businesses
  - Sole Source – certain conditions/circumstances must apply
  - Standards of Conduct/Conflicts of Interest
  - Cost/price analysis
  - Suspension/Debarment – vendor eligibility
  - Documentation requirements
Discussion (cont.)

- Highlights of OUHSC policy and procedure revisions
  - University procurement policy purchase thresholds will remain the same (small dollar purchases up to $5000, bids required over $5000, formal solicitations required over $50,000)
  - Search for qualified small and minority owned businesses to include on vendor lists for solicitations
  - Additional scrutiny of sole source justifications and detailed documentation requirements
  - Vendor suspension and debarment checks
  - Board of Regents policy and state procurement rules still apply regardless of funding with additional federal requirements
Discussion (cont.)

• Most impactful changes to the procurement process for federally funded purchases
  ▪ Inclusion of small and minority owned business vendors
  ▪ Check of excluded vendors/suspension and debarment lists and retaining documentation
  ▪ Rationale for selecting specific methods of procurement (quotes, bids RFP’s) according to anticipated purchase amounts
  ▪ Meeting several requirements to justify non-competition or sole source
  ▪ Cost/price analysis
  ▪ Document, document, document!
• Sample Requisition Review – discussion on two types of purchases
  ▪ Purchase requiring competitive bid
  ▪ Sole Source
Questions?

Notes