

NUMBER: 1627

TITLE: Procurement Reporting Exemption

APPROVED: September 9, 2005

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 sole 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 in excess of \$1,000 shall be entered into eVA.
2. Transactions under \$1,000 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. eVA users are authorized to utilize SPCC up to \$5,000 per procurement, but shall enter all purchases over \$1,000 into eVA as a confirming order with the exception of eVA exempt and over the counter transactions.
5. 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.
6. eVA eProcurement tools (e-Solicitation for bids and proposals and Reverse Auctions) shall be utilized for all procurements in excess of \$30,000.
7. 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.
8. Quarterly spend reports shall be generated by the Director of Materiel Management 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. Contract Purchases (ODU, VASCUPP and VaPP/State Contracts)
 - a. Orders may be issued using:
 - (1) eVA Requisition (*contract number must be referenced in contract number field*)

Orders for more than \$100,000 will automatically come to Materiel Management for approval.
 - (2) SPCC up to cardholder's transaction limit

SPCC for more than \$1,000 must be entered into eVA and identified as a confirming order.

- b. Links to available contracts
 - (1) <http://www.odu.edu/webroot/orgs/AF/MM/materielmanagement.nsf/pages/departmentsmain> - select ODU Contract Listing for printable pdf file.
 - (2) <http://www.vcu.edu/procurement/coopcon.htm> (VASCUPP)
 - (3) <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 \$1,000 (*not required to be entered in eVA*)
 - (1) 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.*)
 - (2) Documentation requirements: None
 - b. Non-SPCC - \$0 to \$1,000

Obtain one quote from an eVA registered vendor, utilizing SWAM vendors to the maximum extent practicable.
 - c. SPCC - \$1,000 up to cardholder’s transaction limit must be entered in eVA as a confirming order

Utilize eVA Quick Quote to solicit quotes, one of which shall be a woman or minority owned business (SWAM) vendor, as certified by the Department of Minority Business Enterprise, when available.

 - (1) Link to DMBE website - <http://www.dmb.state.va.us/vendors.html>
 - (2) Link to DGS commodity codes website - <http://www.eva.state.va.us/NIGPCodes/NIGPCodes.htm>
 - d. eVA Quick Quote - \$1,000 to \$50,000 (Except orders for professional services greater than \$30,000 which must be sent to Materiel Management for processing.)
 - (1) Orders for more than \$5,000 will automatically come to Materiel Management for approval.
 - (2) May not de-select a small, minority or woman-owned business from the bidder list eVA will generate.

- (3) After award:
 - a) Download summary responses into an Excel spreadsheet.
 - b) Post this spreadsheet (bid tabulation) on VBO under “Other Postings”.
 - c) Remember to add any responses not received via eVA.
(No further documentation required.)

- e. 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 come to Materiel Management for approval and shall have sole source justification form electronically attached. Link to sole source form on Materiel Management webpage u n d e r F o r m s o r [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](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.
 - c) SPCC for more than \$1,000 must be entered into eVA as confirming delivery orders

 - (2) Documentation requirements:
 - a) eVA Requisition
 - i. Change PO category to S01.
 - ii. Up to \$5,000 sole source justification shall be entered into comment section.
 - iii. Orders for more than \$5,000 shall have Materiel Management sole source justification form electronically attached
 - b) SPCC – Justification shall be attached to the cardholder’s copy of the monthly log.

- f. 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. Departments shall utilize woman or minority owned business vendors in so far as possible.
 - 1. Orders may be issued using
 - a) eVA Requisition - Orders for more than \$5,000 will automatically come to Materiel Management for approval.
 - b) SPCC up to cardholder’s transaction limit.

- c) SPCC for more than \$1,000 must be entered into eVA as confirming delivery orders
2. Documentation requirements:
- a) eVA Requisition
 - i. Change PO category to E01
 - ii. Up to \$5,000 sole source justification shall be entered into comment section.
 - iii. Orders for more than \$5,000 shall have detailed emergency purchase justification form electronically attached
 - b) SPCC – Justification shall be attached to the cardholder’s copy of the monthly log.