



**OFFICIAL POLICY**

**Subject/Title:** Purchasing of Goods and Services Policy

**Policy Number:** FPU-8.0011P

New  Revised  Technical Revisions Only  Emergency Policy

**Date First Adopted:** October 15, 2014

**Date Revised:** November 3, 2017, October 4, 2023

**Responsible Division/Department:** Administration and Finance

**Initiating Authority:** Vice President, Administration and Finance & CFO

**A. APPLICABILITY and PURPOSE:**

This purchasing policy is applicable to all individuals who participate directly or indirectly in the purchase of goods or services for Florida Polytechnic University (Florida Poly).

**B. POLICY STATEMENT:**

This policy supplements Chapter 18 of the Board of Governors regulations ("BOG regulations") and Florida Poly regulation 8.001 ("FPU-8.001").

**1. Authority to Execute Contracts and Agreements**

The President and the President's designees are the only individuals who have the authority to enter into contracts on behalf of the University. University employees must not execute contracts and other documents of agreement or commitment on behalf of the University unless they have a written delegation of authority to do so.

**2. Purchasing Services Responsibility and Authority**

In addition to the duties listed in FPU-8.001(3), the Procurement Department has the duty to:

- a. Develop purchasing procedures.
- b. Propose purchasing policies and maintain a purchasing procedures manual.
- c. Assemble plans and/or specifications in cooperation with user department/divisions that are included in Invitations for Bid, Invitation to Negotiate, Requests for Proposals, Requests for Quotations, and Best Value Procurement.
- d. Assist departments/divisions in establishing standardization of goods and services, where practical, within a competitive environment.
- e. Waive any minor irregularities in an otherwise valid solicitation or reply. Variations that are not minor cannot be waived.
- f. Administer the Purchasing Card Program (P-Card)
- g. Perform other duties as directed by the President or designee.
- h. Make purchases only for University departments, units, centers and institutes, student government, and the Florida Polytechnic University Foundation.

**3. Ethics and Standard of Conduct**

All University staff engaged in purchasing and related activities shall conduct business dealings in a manner above reproach in every respect. Transactions relating to the expenditure of public funds requires the highest degree of public trust to protect the interests of the University and the taxpayers of Florida. All University staff engaged in the purchasing cycle are bound by the standard of conduct for public officers and employees set forth in Chapter 112, Code of Ethics for Public Officers and Employees, Part 3, Florida Statutes.

#### **4. Purchasing Cycle**

The purchasing cycle starts when a University department or Procurement recognizes a need for a commodity or contractual service. The department is responsible for communicating a departmental need to the Procurement Department. The Procurement Department will fulfill needs in accordance with the purchasing methods, threshold levels and Purchasing Procedure Manual.

#### **5. Purchasing Methods**

Upon request from a user department/division, the Procurement Department will seek a source of supply and enter into transactions for the purchase of the commodity or contractual service, in accordance with the University's Purchasing Procedure Manual. The method of purchasing used will be determined by the estimate dollar amount of the requested purchase, the nature of the purchase, other factors and in the best interest of the University. Purchasing methods may include, but are not limited to:

- a. Credit Card Purchases
- b. Request for Quotations (RFQ) - Informal and Annual/Term Quotations
- c. Invitation to Bid (ITB) - Regular and Annual/Term Bids
- d. Request for Proposals (RFP)
- e. Best Value Procurement (BVP)
- f. Emergency Purchases (EP)
- g. Alternate Vendor Selection (AVS)
- h. Notice of Intent to Sole Source (ISS)
- i. Sole Source Purchase (SSP)
- j. Request for Information (RFI)
- k. Invitation to Negotiate (ITN)
- l. Letters of Interest (LOI)
- m. Cooperative Purchasing, Governmental Contracts and Compatibility
- n. Auctions or Reverse Auctions

All purchases should be in the best interest of the University and should maximize competition and prudent spending to the greatest extent possible.

Purchases using alternate funds shall follow the requirements of the agency granting the funds.

Specifications shall be written to encourage fair and open competition whenever possible.

Awards shall be made based upon criteria set forth in the solicitation and in accordance with the University Purchasing Procedure Manual.

#### **6. Threshold Levels and Standards**

**Category 1:** \$0.00 - \$10,000.00: verbal or written quote solicited by the department

**Category 2:** \$10,000.01 - \$25,000.00: a minimum of two (2) verbal or written quotes

**Category 3:** \$25,000.01 - \$149,999: a minimum of three (3) written quotes

**Category 4:** \$150,000 and greater: sealed, formal competitive solicitation solicited by the Procurement Department unless the purchase is exempted or excepted from the competitive solicitation process pursuant to the BOG or FPU regulations.

The fundamental purpose of establishing threshold levels is to aid in the initial determination of the most appropriate purchasing method. Purchases shall not be artificially divided so as to circumvent competitive purchasing requirements.

Please note: If deemed to be in the best interest of the University, The Procurement Department reserves the right to issue a formal solicitation regardless of the dollar amount.

**7. Environmentally Preferred Purchasing**

The Procurement Department is committed to the purchasing of commodities and contractual services that minimize negative environmental and social impacts and emphasize long-term values. Preference may be given to such commodities and contractual services. Such purchases may consider raw materials acquisition, productions, manufacturing, packaging, distribution, reuse, operations, maintenance, or disposal of the commodity or service.

**8. Transparency of Solicitation Documents**

Category 4 Solicitations will be noticed by the University on the web.

**C. PROCEDURES: [if any are necessary]**

Procedures are provided in the Purchasing Procedures Manual.

POLICY APPROVAL	
Policy No.: FPU-8.011P	
<i>Initiating Authority</i>	<i>Signature Date</i>
<i>Policies Committee Chair</i>	<i>Signature Date</i>
<i>President</i>	<i>Signature Date</i>
<i>FPU-BOT Approval:</i> <input type="checkbox"/> <i>Required</i> <input checked="" type="checkbox"/> <i>Not Required</i>	<i>Date Approved (if required)</i>
EXECUTED SIGNATURE PAGES ARE AVAILABLE IN THE OFFICE OF THE GENERAL COUNSEL	

