

Creating Requisitions – General Processing Rules

Requisitions submitted by campus customers to the Purchasing Department which have errors and do not comply with UCO Policy, RUSO Policy, OSF and/or Oklahoma State Statute shall be returned to campus customers for correction.

Split purchasing is defined as "dividing a known quantity or failing to consolidate a known quantity of an acquisition for the purpose of evading a competitive bidding requirement". Split purchasing is illegal and a felony in accordance to Title 74 O.S. The wrongful practice also evades UCO and RUSO policy.

When seeking quotes, all vendors must be provided and required to offer a quote on the same, exact list of products or specifications for services. Different vendors cannot be given different products or specifications to quote, as this compromises the integrity of a quote. In regard to quoting products, if there is no brand preference or a like item is acceptable in comparison to the product being quoted, this information should be shared with all vendors when seeking quotes.

Requisitions must be written out in accordance to the itemized quote provided by the Vendor. This process allows for all items to be accounted for in the ordering process and the receiving process.

For more information in writing Banner requisitions, campus customer should review the [Introduction To Banner Requisitions User Guide](#) for helpful and useful information.

[Creating Requisitions](#) - Training Document

When quoting physical services to be performed on campus involving services for a specific project, no matter the dollar amount, a written scope of work defined by UCO must be offered to the vendor(s) to quote upon. The scope of work for all services of any dollar amount is required to be attached to the requisition along with the other supporting paperwork to include the service agreement and vendor quote(s). The scope of work should clearly delineate what/where/when along with any factors regarding specific brands or features, time frame, potential problems disclosed, start/finish dates and details regarding UCO approval, completion of project and first beneficial use. The vendor quote information and the scope of work designated by UCO shall combine to be the verbiage on the requisition, which will be the UCO Purchase Order Contract.

'No Bid' quotes are acceptable, but there are stipulations when utilizing these. A documented 'no bid' is the only acceptable means. The initial quote request must be sent to a specific individual within the vendor's company. A written reply from the vendor stating the reason they offer no bid or no quote is necessary for the 'no bid' to be considered as a viable quote. 'No Bid' quotes must be in writing, despite statute threshold dollar amounts.

Service related acquisitions should always include a 'NOT TO EXCEED', also referred to as NTE, notation on all requisitions. Service related acquisitions require the necessary service contract documentation to be in compliance with the IRS and [Independent Contractor](#) regulations.

In accordance to Title 74 O.S., 74-85.3A.E.c, Change Orders may be issued to increase a purchase order or contract for the acquisition that do not exceed an increase of ten percent (10%) of the original purchase order or contract total price.

W-9 Forms are required for individuals or companies not already established as vendors within the University's Banner database. The requesting department should include the W-9 with these noted requisitions.

If an acquisition for goods or services pre-dates the requisition (encumbrance document) by more than thirty days, no purchase order can be processed by the Purchasing Department without appropriate justification from the department offering the requisition. The thirty days will be determined on the date of the service or date of ordering goods to the date the requisition is clocked into the Purchasing Office. Days and timing shall be considered to determine the 30-day grace period, to allow the Purchasing Department to process contracts, paperwork and seek additional signatures. See "Documents and Forms" for a [fillable PDF Letter of Justification](#).

Acquiring Consultant Services: Effective May 7, 2014, per RUSO Audit Findings, the Purchasing Department will assist campus customers in understanding the appropriate ways to obtain the highest qualified and best valued consultant/consultant firm through the competitive bidding process in lieu of a sole source.

Purchases by dollar amounts and the competitive bidding rules to be considered:
Purchases up to \$2,499.00 may be made via ProCard. [See the ProCard website for newly revised dollar threshold information](#). There is no requirement for competition at this order level, but as an institution we encourage the University to ensure the best value purchase. See [ProCard webpage](#) for requirements and restrictions.

Purchases up to \$2,499.00 may be made via valid UCO purchase order if ProCard cannot be utilized. Reasons for not utilizing the ProCard shall be explained on the requisition by the requester. There is no requirement for competition at this order level, but as an institution we encourage the University to ensure the best value purchase. If the purchase involves a service related project, e.g. painting, fencing, athletic fieldwork, electrical services/hardwiring, door installation, etc., despite the statute and policy threshold dollar amount for written quotes, UCO must have a written scope of work and receive a written Vendor quote which will be combined to produce the requisition and purchase order. These written documents between UCO and the Vendor assure a clear understanding of the specific service related project and protect the University against incomplete work which could lead to legal issues.

Purchases exceeding \$2499.00 but no greater than \$50,000.00 are subject to competitive bidding. All quotes must be documented in writing (printed, email or letter) and provided with the requisition. As of 7/1/2013, no verbal quotes shall be accepted. A documented, written 'no bid' response is the same as receiving a quote for the purpose of this policy, however, the Purchasing Department reserves the right to re-quote any acquisition having NO BIDS as documentation to assure the best cost has been sought. If the purchase involves a service related project, e.g. painting, fencing, athletic fieldwork, electrical services/hardwiring, door installation, etc., UCO must have a written scope of work and receive written vendor quotes. The written documents between UCO and the Vendor assure a clear understanding of the specific service related project and protect the University against incomplete work which could lead to legal issues. Per Oklahoma Statute, lowest quote is awarded the PO. If the requester is seeking the best value vendor, a formal RFP must be issued through the Purchasing Department. Formal bidding requires three months and to start this process, the requester shall email the scope of work to the Director of Purchasing. See below for more details.

Purchases \$50,000.00 and greater require formal competitive bidding. Specifications and scope of work should be emailed to the Director of Purchasing. The type of formal solicitation will be deemed by the Director of Purchasing based on the following criteria:

ITB (Invitation to Bid) - Award decision will be made based on the lowest dollar bid with no other factors considered.

RFP (Request for Proposal) - Award decision will be made by committee based on 'best value' proposal, considering evaluation criteria which will be more than just price, in the award decision. For any purchases in excess of \$50,000.00, the requestor must submit the specifications and/or entire detailed scope of work to the Director of Purchasing for review. The final decision whether to make a purchase in excess of \$50,000.00 from a consortium contract or by way of formal solicitation will be at the discretion of the Director of Purchasing. Purchases in excess of \$50,000.00 require a three month RFP writing, bidding, evaluation, award process. Requestors should submit specifications and scopes to the Director with this noted lead time.

Purchases greater than \$150,000.00 require RUSO approval. Requestor should submit the specifications and/or scope of work to the Director of Purchasing and advise of the in excess of \$150,000.00 expenditure and budget. RUSO approval will be sought by the Director of Purchasing by way of request on the board letter at the next scheduled board meeting. This process could possibly add additional time to the processing of the solicitation due to the scheduling of the board meetings and the timing of the request. Purchases less than \$150,000.00 do not require RUSO approval, but RUSO does require written notification of the purchase. The Director of Purchasing provides a monthly summary of purchases meeting the requirement to the Executive Vice President and subsequently to the RUSO Board as informational items.

Purchase Orders will be processed within four days once all back up to support the purchase has attached to the requisition. Incomplete requisitions or requisitions without supporting documentation will be returned to the requester through campus mail.