

1. Introduction and Contact Information

- University Purchasing and Disbursement Services is a unit of the University Controller's Office, also known as Finance and Accounting. While Purchasing and Disbursement Services is a single combined unit designed to ensure that the procurement and payment process is as seamless as possible, this section of the Directives and Procedures will focus on the procurement or purchasing process as the following section focuses on payment or disbursement.
- The intent of these Directives and Procedures is to provide the campus community with uniform and consistent direction relative to appropriate purchasing procedures and practices for the acquisition of commodities, contractual services and construction. University Purchasing Services will be glad to assist with procurement and purchasing issues and can be reached at 352-392-1331.
- Section 1001.74 (5), Florida Statutes, grants acquisition authority to the University Board of Trustees. Section 1001.75(5), Florida Statutes, delegates responsibility for the purchasing function to the University President or their designee(s). Florida Administrative Code, 6C1-3.020 establishes the Purchasing Rules for administration of a purchasing program at the University of Florida.
- Purchasing involves the acquisition of equipment, furnishings, supplies, construction services, maintenance services, professional services, contractual services, and the lease of space for the University within pre established budgetary constraints. Purchasing functions also include preparing budget estimates; preparing bid specifications; initiating formal quotations, proposals and bids; conducting public bid openings; evaluating bids; and negotiating and awarding contracts.
- Except as otherwise delegated herein, Purchasing Services is the only University department authorized to commit funds for the acquisition of commodities or services and is the initial point of contact for service contracts and agreements prior to any obligation or commitment by the University.
- It is the intent of the University to acquire quality goods and services within reasonable or required time frames, while promoting fair and open competition in the public procurement process. Responsible purchasing officials shall be protected from improper pressures of external political or business interests. The process shall reduce the appearance and opportunity for favoritism, ensure that contracts are awarded equitably and economically, and establish management oversight in the acquisition of commodities and contractual services, in order to preserve the integrity of

public purchasing and contracting. The opportunity to bid on University contracts is a privilege, not a right.

2. Definitions

- **Amount Only PO** - It is a purchase order (PO) for an unspecified quantity of a product or service over a time period.
- **Artistic Services** - Services provided by an individual or group of individuals who profess and practice a skill in the area of music, dance, drama, folk art, creative writing, painting, sculpture, photography, graphic arts, web design, craft arts, industrial design, costume design, fashion design, motion pictures, television, radio or tape and sound recording or in any other related field.
- **Business** - Any corporation, partnership, individual, sole proprietorship, joint stock company, joint venture or any other private legal entity which has commodities and/or services available under specifications required by the University.
- **Commodity** - Any of the various supplies, materials, goods, merchandise, food, equipment or other personal property, including a mobile home, trailer or other portable structure, which are purchased, leased, lease-purchased or otherwise contracted for by the University. Commodity also includes interest on deferred-payment contracts entered into by the University for the purchase of other commodities. Printing of publications, vehicles and software and license agreements shall be considered commodities.
- **Competitive Bid/Proposal** - The response submitted to an Invitation to Bid (ITB), Request for Proposal (RFP), or an Invitation to Negotiate (ITN) by responsive and qualified bidders or offerors.
- **Competitive Negotiation** - The establishment of a contract through deliberation, discussion or conference on the specifications, terms and conditions of a proposed agreement.
- **Competitive Solicitation** - An Invitation to Bid (ITB), Request for Proposal (RFP) or Invitation to Negotiate (ITN) to competitively select a contractor or supplier.
- **Construction** - Construction means the building, altering, improving, repair, or demolishing of any real property owned or leased by the University.
- **Contract** - Any agreement or purchase order for the purchase or disposal of commodities or services.
- **Contractor/Supplier** - A person or firm who contracts to sell commodities or contractual services to the University.
- **Contractual Service** - The rendering by a contractor of its time and effort rather than the furnishing of specific commodities. The term applies only to those services rendered by individuals and firms who are independent contractors. Contractual service does not include labor or materials for the construction, renovation, repair or demolition of facilities.

- **Definite Quantity Contract** - A contract to furnish a specific quantity of an item or items at a specified price and time. The contract is fulfilled by delivery and acceptance of the specific quantity at the University, on such place designated in the contract.
- **Department** - A budget entity, which has been assigned a departmental ID, and fund by the University.
- **Duplicating** - The process of reproducing an image or images from an original to a final substrate through the electro photographic, xerographic, laser, or offset process or any combination of these processes, by which an operator can make more than one copy without rehandling the original.
- **Emergency Purchase** - The purchase of commodities or services due to a danger to the public health, the safety or the welfare of person(s), animal(s), the preservation or protection of property, or the continuance of a vital University function. Note that emergency purchases can only be applied to unforeseen events; a lack of planning does not constitute an emergency.
- **Extension** - An increase in the time allowed for the performance of the contract.
- **F.O.B.** - The term literally means "free on board". It is defined as the time and place of the actual transfer of title to the goods from seller to buyer. F.O.B. Destination means legal title passes to the buyer at the time the shipment of goods is delivered by the carrier. F.O.B. Shipping Point means legal title and risk of loss passes to the buyer at the time of shipment of goods is delivered to the carrier.
- **Identical (Tie) Bids** - Two or more bids which are equal in all respects as to price, quality, service, and terms and conditions.
- **Information technology resources** - all equipment, hardware, software, firmware, programs, systems, networks, infrastructure, supplies, media and related material, services, personnel and facility resources used to automatically, electronically, and wirelessly collect, receive, access, transmit, display, store, record, retrieve, analyze, evaluate, process, classify, manipulate, manage, assimilate, control, communicate, exchange, convert, converge, interface, switch, or disseminate information of any kind or form.
- **Independent Contractor** - A person or firm who provides a commodity or service to the University but does not have any employment or other relationship or connection with the University, except as provided in s. 112.313, Florida Statutes (F.S.).
- **Invitation to Bid (ITB)** - A written solicitation for competitive sealed bids, designating the title, date, and hour of the public bid opening and also defining the commodity, group of commodities or services.
- **Invitation to Negotiate (ITN)** - An invitation extended to prospective contractors, whether by advertisement, written solicitation, electronic media or any other form

of communication, to define the specifications, terms and conditions of a contract for commodities or contractual services.

- **Minority Business Enterprise** - A business concern as defined in s. 288.703(2), F.S.
- **President** - The chief executive officer of the University, responsible for its operation and administration.
- **Public Entity Crime** - A violation of any state or federal law by a person in the transaction of business with any public entity of any state or with the United States government involving antitrust, fraud, theft, bribery, collusion, racketeering, conspiracy or material misrepresentation.
- **PCard (Purchasing Card/Procurement Card)** - A PCard is a method of purchasing official university-related, low-cost, non-capital commodities and services, such as office supplies, travel expenses, utility and telecommunication expenses and is issued to University employees.
- **Printing** - The transfer of an image or images by the use of ink or similar substance from an original image to the final substrate through the process of letterpress, offset lithography, gravure, screen printing, or engraving. Printing shall include the process of and the materials used in binding. Printing shall also include duplicating when used to produce publications.
- **Purchase** - An acquisition of commodities, services or licenses obtained by purchase order, contract or other authorized purchasing method, whether by rent, lease, installment, lease-purchase or outright purchase.
- **Purchasing Activity** - A University function delegated to Purchasing Services by the University President, to develop descriptions/specifications, selection and solicitation of sources, and prepare award of contracts for commodities and services.
- **Purchasing Officer** - A person, delegated the authority by the University President, to enter into, award, modify or terminate contracts and make related determinations and findings. The term includes any authorized representatives of the purchasing officer acting within the limits of their authority.
- **Purchases for Resale** - The purchase of commodities or contractual services acquired for the purpose of re-selling them to third parties in the course of University business.
- **Quotation** - A written or verbal offer for commodities or services not requiring a public opening at a specific date and time.
- **Renewal** - Contracting for an additional period of time after the initial contract term, provided the original terms of the agreement specify an option to renew.
- **Request for Proposal (RFP)** - A written solicitation for competitive proposals for commodities or contractual services with the title, date, and hour of the public opening. The request for proposal is generally used when the scope of work is not clearly defined.

- **Responsive and Qualified Bidder or Offeror** - A contractor/supplier who has submitted a bid or proposal that conforms in all material respects to a competitive solicitation.
- **Sole Source Purchase** - A purchase of commodities or services that are non competitive, i.e. product or services being purchased must perform a function for which no other product or source of services exists.
- **Term Contract** - A contract for the purchase of commodities or contractual services over a prescribed period of time.
- **Valid Response** - A responsive offer in compliance with bid specifications and conditions.
- **Vehicles** - Includes any automobile, truck, motorcycle, bicycle, golf cart, watercraft or other vehicle designed primarily for transporting persons as well as construction vehicles or farm equipment.
- **Supplier/Contractor** - A person or firm who contracts to sell commodities or contractual services to the University.

3. Purchasing Services Responsibilities

- The University President has delegated the following contracting duties to Purchasing Services:
 - Canvass all sources of supply and contract for the purchase, lease, or acquisition in any manner of all commodities, construction, installment, lease-purchase and services required by the University, under competitive bidding or contractual negotiation. Installment- or lease-purchase contracts may provide for the payment of interest on unpaid portions of the purchase price.
 - Remove any contractor from the University's competitive vendor list that fails to respond to three (3) or more invitations or to fulfill any of its duties specified in a contract with the University and to reinstate any such contractor when satisfied that further instances of default will not occur. A "No Bid" is a response.
 - To plan and coordinate purchases in volume and to competitively bid, negotiate and execute purchasing agreements and contracts for the recurring needs of the University.
 - To prescribe the methods of securing bids or negotiating and awarding contracts.
 - To negotiate on the best terms and conditions in the event no bids are received.
 - To establish standards, assist in formulating specifications, and determine the source of supply for any commodity or service

requisitioned by any department of the University, except as specifically provided under Section 12.3.B, Contracting Authority.

- To execute contracts, whether by purchase order or other approved purchasing method, for commodities and services required by the University.
- Evaluate the ability of any vendor to remain on a competitive vendor list, based on the vendor's responsiveness to competitive solicitations, the vendor's ability to fulfill the duties specified in contracts, or any disruptive or unprofessional conduct or conduct which is not conducive to the University environment on the part of the vendor or its agents.
- The Inter-institutional Committee on Purchasing (ICOP) has developed policies and guidelines for establishing system wide contracts and cooperative agreements for use by the universities. ICOP will monitor frequent purchases made by the universities and initiate actions to establish system wide contracts as deemed necessary and appropriate.
- Evaluate and approve contracts led by the Federal Government, the State, instrumentalities of the State, other states, political subdivisions or entities, colleges, universities, educational cooperatives or educational consortia for the procurement of commodities and contractual services, when it is determined to be cost-effective and in the best interest of the University to make purchases under contracts let by such other entities.
- Elect as an alternative to the provisions of s. 120.57(3)(c) F.S., to proceed with a bid solicitation or contract award process when it is set forth, in writing, that the particular facts and circumstances which demonstrate that the delay due to staying the solicitation or contract award process would be detrimental to the interests of the University. After the award of contract resulting from a competitive solicitation in which a timely protest was received and in which the University did not prevail, the contract will be canceled and re-awarded to the prevailing party unless the final order or settlement between the parties provide otherwise.
- Award contracts for commodities and contractual services. This includes the authority to make awards to multiple suppliers, if it is determined to be in the best interest of the University. Such awards may be on a university, regional or multiple state university-wide basis and the contracts may be for multiple years.
- Reject or cancel any or all-competitive solicitations, in whole or in part, when determined to be in the best interest of the University.
- Purchase insurance as appropriate for the operation and mission of the University.

4. Contracting Authority other than Purchasing

- The President has delegated to the following University positions, not under the supervision of Purchasing Services, the following contracting duties:
 - Vice President for Finance and Administration to approve and execute contracts for the University, in the absence of the President.
 - Vice President for Research to approve and execute all grants, donations, and research and instructional contracts received on behalf of the University.
 - Director, Sponsored Research to approve and enter into agreements for activities and programs using sponsored research and grant funds in accordance with University policies, directives and procedures and to recommend to the Purchasing Director the use of the sponsored research exemption.

5. Code of Ethics and Standard of Conduct

- All University personnel engaged in purchasing and related activities shall conduct business dealings in a manner above reproach in every respect. Transactions relating to expenditure of public funds require the highest degree of public trust to protect the interests of the University and the taxpayers of Florida. All University personnel engaged in the purchasing cycle, including the President, Vice Presidents, Deans, Chairpersons, Directors, budget committee members, initiators of requirements and their supervisors, receiving personnel, finance and accounting personnel, PCard holders, and all members of a purchasing activity are bound by the standard of conduct for public officers and employees set forth in Chapter 112, Part 3, Florida Statutes and University of Florida Rule on University Ethics, Rule 6C1-1.011, F.A.C.

6. Employee Conflict of Interest

- Except as may be permitted by the directives of the University of Florida it shall be a breach of ethical standards for any employee of the University to participate directly or indirectly in the purchasing process when the employee knows that:
 - He/she or any member of his/her immediate family will benefit from a University purchasing transaction.
 - A business or organization in which he/she, or any member of his/her family, (spouse, children, parents, brothers and sisters) has a financial interest and will benefit from a University purchasing transaction.
 - Any other person, business or organization with whom he/she or any member of his/her immediate family, is negotiating or has an

arrangement for employment and will ultimately benefit from a University purchasing transaction.

- All employees having a financial interest in a private concern shall file a statement annually with the University disclosing such interest.
- All individuals taking part in the development or selection of criteria for evaluation, the evaluation process, and the contract award process in any purchase shall be independent of, and have no conflict of interest in the entities evaluated and selected.

7. Gratuities

- It shall be a breach of ethical standards for any employee of the University to accept, solicit, or agree to accept a gratuity of any kind for personal gain in connection with any contract for commodities or services. Current or potential contractors are prohibited from offering an employee of the University a gratuity of any kind for the employee's personal gain to influence the development of a contract or potential contract for commodities or services.

8. Monetary Levels and Limits

- Purchases of at Least \$1000 Any agreements containing terms and conditions, or other such verbiage, including Maintenance Agreements, Software License Agreements, etc., requiring signature must be forwarded to Purchasing Services where they will be reviewed and signed.
- Purchases Below \$5000 It shall be the Purchasing Coordinator's discretion whether quotes are needed on purchases below \$5000. Quotations are encouraged whenever possible.
- Purchases \$5000 - \$24,999 Documented quotations from two or more vendors by telephone, fax, email, or justification why not obtained is required for purchases greater than \$5000 to \$24,999. Verbal quotes may be documented on the requisition.
- IT Purchases of \$20,000 and above Information technology resources acquisitions costing \$20,000 or more must be approved by the University Information Resource Manager (IRM).
- Communications Purchases of \$25,000 and above All communications resources purchases of \$25,000 or more must be approved by the University Information Resource Manager (IRM).
- Purchases \$25,000-\$74,999 Written quotes from two or more vendors or written justification why quotations were not obtained shall be obtained for purchases greater than \$25,000 to \$74,999. Purchasing Services may, at their discretion, waive the requirement for written quotations when it is in the best interests of the University. The purchasing file shall be documented prior to the processing of a

purchase order by the Purchasing Coordinator as to the circumstances when competitive quotes are not obtained.

- Purchases of \$75,000 and above
 - Formal competitive bids, (ITB/RFP/ITN) are required on purchases of commodities, contractual services, deferred payment and revenue generating contracts in excess of \$74,999. A formal two-party contract may be required for contract services. For the purposes of determining the bidding threshold the total cost of the requirement may include any options, add or deduct alternates, and trade-ins, for the life of the contract.
 - Commodities or contractual services available only from a single source, may be exempted from the bid requirements when the University certifies and documents that there is only one source of supply capable of meeting all specifications, terms and conditions to the University's satisfaction.
 - Software license agreements that exceed the \$75,000 level will be forwarded by Purchasing Services to the University's General Counsel Office for review prior to being signed by Purchasing Services. The Purchasing Coordinator will notify the department when this occurs.
- Purchases of \$100,000 and above The President or his designee may require a Payment and Performance (P&P) Bond on contracts for the construction of any public building or for repairs on any public building or public work between \$100,000 and \$200,000. Projects in excess of \$200,000 must require a Payment and Performance Bond. NOTE: It is good practice to require a P&P bond whenever the project exceeds \$100,000.
- Purchases of \$150,000 and above
 - Contractual Service Contracts for greater than \$150,000 must be reviewed by the General Counsel.
 - Invitations to Bid, Requests for Proposal and Invitations to Negotiate for commodities expected to be in excess of \$150,000 shall be advertised. The venue is selected by the purchasing Coordinator and may include the University Purchasing website, the Florida Administrative Weekly, or Florida Communities Network. The Purchasing Director has the authority to waive the advertisement requirement when the number of potential bidders or proposers is limited and can otherwise be solicited, when the availability of funding requires or where delivery is urgent.
- Purchases of \$200,000 and above A construction project exceeding \$200,000 must be advertised in the Florida Administrative Weekly for a period of 21 days.
- Purchases of \$1,000,000 and above All purchases in excess of \$1 million will be reviewed and approved by the President. For contracts and software license

agreements, the contract will be processed by Purchasing with legal review and involvement. When completed and signed by the vendor, it will be transmitted with cover memo to the Vice President, Finance and Administration for delivery to the President.

9. Unauthorized Purchases

- Purchases for Individuals

Purchasing Services is not authorized to make purchases for any individual or non University organization.

- Splitting of Orders

The deliberate attempt to split orders, where the purpose is keeping the total cost of each order below bid or quote limits, and failure to combine orders when practical for the interest of economy, is an evasion of the Florida Statutes and University Purchasing Directives. The splitting of orders is a prohibited activity and therefore, unlawful. Any related needs that are known or should have been reasonably known at the time of the requirement should be combined into one coherent request for procurement.

- Purchases of a Personal Nature

The expenditures from University funds for the items listed below are prohibited unless a clear business purpose exists. (See Disbursements Directives [1.4.13.3 A](#) and [B](#))

- Alcohol
- Congratulatory telegrams
- Flowers and/or telegraphic condolences
- Entertainment for visiting dignitaries
- Food items - refreshments, such as coffee and doughnuts
- Decorative items, such as globes, statues, potted plants, desk lamps, picture frames, and wall hangings
- Christmas or other greeting cards and postage for such cards
- Personal subscriptions to magazines and trade journals
- Gifts - for example: desk pen sets
- Coffee pots and supplies
- Portable heaters
- Fans, for personal use

- Refrigerators, stoves or microwave ovens for personal use
- Confirming Purchase Orders

Departments are not authorized to place orders directly with vendors for goods or services for which a purchase order is required. Purchasing Services is the only authorized agent for the University. If a department has an immediate need, Purchasing Services may confirm an order with a vendor after the proper acquisition method has been selected and executed. In the event that the department receives goods prior to the approval of Purchasing Services, an explanation/justification shall be provided with the requisition.

10. Exemptions from Competitive Purchasing Requirements

- The following commodities and services are exempt from competition (6C1-3.020) FAC:
 - Artistic services.
 - Academic reviews.
 - Lectures.
 - Auditing services.
 - Legal services, including attorney, paralegal, expert witness, appraisal, arbitrator or mediator services. Written approval from the Attorney General is not required for private attorney services acquired by the University, pursuant to s. 287.059, F.S.
 - Health services involving examination, diagnosis, treatment, prevention, medical consultation or administration. Prescriptive assistive devices for medical, developmental or vocational rehabilitation including, but not limited to prosthetics, orthotics, and wheelchairs, provided the devices are purchased on the basis of an established fee schedule or by a method that ensures the best price, taking into consideration the needs of the client.
 - Services provided to persons with mental or physical disabilities by not-for-profit corporations organized under the provisions of s. 501(c) (3) of the Internal Revenue Code or services governed by the provisions of the Office of Management and Budget Circular A-122.
 - Medicaid services delivered to an eligible Medicaid recipient by a health care provider who has not previously applied for and received a Medicaid provider number from the Department of Children and Family Services. This exception will be valid for a period not to exceed 90 days after the date of delivery to the Medicaid recipient and shall not be renewed.
 - Family placement services.

- Training and education services.
- Advertising.
- Services or commodities provided by the Federal Government, the State, instrumentalities of the State, other states, political subdivisions or entities, colleges, and universities.
- Continuing education events or programs that are offered to the general public for which fees have been collected to pay all expenses associated with the event or program.
- Purchases from firms or individuals that are prescribed by state or federal law or specified by a granting agency.
- Regulated utilities and government-franchised services.
- Regulated public communications, except long distance telecommunication services or facilities.
- Extension of an existing contract.
- Renewal of an existing contract if the terms of the contract specify renewal option(s).
- Purchases for resale.
- Accountant Services.
- Contracts or services provided by not-for-profit, direct support, health support and University affiliated organizations.
- Implementation, programming, or training services available from the owner of copyrighted software or its agent.
- Purchases of materials, supplies, equipment, or services for research purposes when the Director of Sponsored Research or designee, certifies that, in a particular instance, it is necessary for the efficient or expeditious prosecution of a research project.
- Contract Awards not subject to Competitive Solicitations
 - No person or firm who receives a contract to perform a feasibility study for potential implementation of a subsequent contract, participates in the drafting of a competitive solicitation, or develops a program for future implementation shall be eligible to contract with the University dealing with the specific subject matter.
 - All persons taking part in the development or selection of criteria for evaluation, the evaluation process, and the contract award process in any purchase shall follow all relevant portions of the State of Florida Code of Ethics for Public Employees, Chapter 112, Part 3, Florida Statutes, and the University's rule on outside activities, Rule 6C1-1.011, F.A.C.

11. Other Non Competitive Purchases

- Sole Source Purchase
 - Commodities or contractual services available only from a single source, may be exempted from the bid requirements when the University certifies and documents that there is only one source of supply capable of meeting all specifications, terms and conditions to the University's satisfaction. A completed [Sole Source Certification](#) form is required.
 - a. Description and use (in layman's terms).
 - b. List unique features that this item or service has that other comparable items or services do not have, and why these unique features are needed. Show as clearly and concisely as possible why only this item or this service will accomplish the function required.
 - c. Explain if the product or service is being purchased directly from the manufacturer. If not, explain why the item cannot be bid to the various dealers.
 - d. Explain the necessity for compatibility with existing equipment or instrumentation, if applicable.
 - e. Price cannot be used as a justification for a sole source.
 - The department will furnish, along with the requisition and a sole source certification, a current written quotation from the vendor.
 - If the President or his designee determines, in writing, that there is only one source for the required commodity, service or construction item, the sole source will be posted for three (3) full business days. A purchase order is issued when the posting period is over.
 - Documentation will be maintained that the price quoted is a reasonable price.
- Emergency Purchase
 - When the President or designee determines, in writing, that a condition exists that threatens the public health, safety or the welfare of person(s), animal(s), the preservation or protection of property, or the continuance of a vital University function, Purchasing Services is permitted to proceed with the procurement of commodities or contractual services without a competitive solicitation. The emergency purchase shall be limited to the purchase of the type of items and quantities needed, or for a time period sufficient to meet the immediate threat, and shall not be used to meet long-term requirements.

- Responsibility of the Requisitioning Department - Contact the Purchasing Director immediately to notify Purchasing of the emergency. If the Purchasing Director deems the situation to be a genuine emergency, authorization is given to proceed with the purchase immediately. The department must follow up with a requisition to Purchasing and must attach a complete justification for the emergency purchase. An emergency acquisition is not an excuse for poor planning. All emergencies must meet the above criteria.
- Contracts and Negotiated Annual Price Agreements

Purchases from bid Contracts and Negotiated Annual Price Agreements established by the State, other governmental entities, or other public or private educational institutions, and educational cooperatives and educational consortiums are not subject to further competitive solicitation.

- Sponsored Research Exemption

Section 1004.22(7), F.S., allows the University to exempt the purchase of materials, supplies, equipment or services for research purposes from the general purchasing requirements of Rule 6C1-3.020, F.A.C. and the requirements of Chapters 215, 216 and 283, and Section 112.061, F.S. Such an exemption shall be exercised only when the Vice President for Research or the Vice President's designee certifies to the President in each particular instance that the exemption is necessary for the efficient or expeditious prosecution of a research project. Rule 6C1-3.021 F.A.C. establishes the Sponsored Research Exemption Procedures.

- Construction Direct Purchase Program

Commodities to be incorporated into any public work (as that term is defined in Florida Administrative Code 12A-1.094) which are procured by the University in accordance with the requirements of the University's direct purchase program are not subject to any further competitive solicitation.

12. Making a Purchase

- Requisition to Purchase
 - A requisition should be created to make purchases not made on a Purchasing Card. It is used to request purchases of all commodities/services through Purchasing Services. It provides the chartfield information to be charged, item descriptions, quantity, delivery instructions, vendor information and desired delivery date. Complete and correct preparation of the requisition expedites the purchasing process. Except in the case of an approved emergency, the requisition must be received by Purchasing Services before purchasing action can be initiated.

- A requisition is initiated through myUFI portal.
 - Each requisition should contain only those items that may be purchased from the same vendor.
 - When preparing a requisition state the noun first followed by descriptive information, including manufacturer and part number, if known.
- Purchases from Small and Minority Business Enterprises

The University is an equal opportunity institution and encourages procurement contracting with Small and Minority Business Enterprises.

- Purchases from Contractors Convicted of Public Entity Crimes

The University shall not accept a competitive solicitation from, or purchase commodities or contractual services from, a person or affiliate who has been convicted of a public entity crime and has been placed on the State of Florida's convicted vendor list for a period of 36 months from the date of being added to the convicted vendor list.

- Quotes/Bids/Proposals
 - Purchasing Services shall determine when a quote/bid/proposal is obtained for commodities, services, printing and deferred contracts for any item or group of items, except as provided in section 1.4.12.6. of these directives. For purchases between \$5,000 and \$74,999, informal quotes may be solicited when the commodity or service warrants competitive pricing.
 - Purchasing Services may advertise any formal invitation to bid or request for proposal in a newspaper of general circulation when such public notice is deemed to be in the best interest of the University and consistent with the proposed purchase involved.
 - When only one quote/bid/proposal is received for the purchase of an item or a group of items in a call for quotes/bids/proposals, the Purchasing Coordinator shall review the quote/bid/proposal to determine the reasons, if any, why only one quote/bid/proposal was received. If it is determined that a second call for quotes/bids/proposals would not be in the best interest of the University, the circumstances shall be documented and the Purchasing Coordinator may proceed with the purchase. If it is determined that a second call for quotes/bid/proposals would be in the best interest of the University, the Purchasing Coordinator may issue additional quote/bid/proposal solicitations. The Purchasing Coordinator shall document a single quote/bid/proposal on the requisition for purchases' between \$25,000 and \$74,999. A single formal bid/proposal \$75,000 or more will be

documented on a single bid affidavit and presented to the Director or Assistant Director of Purchasing for approval.

- In the event no quotes/bid/proposals are received, the Purchasing Coordinate may negotiate the purchase at the most favorable terms.
 - When multiple responses that are equal in all respects are received to a competitive solicitation, the University will give preference to responses that include commodities manufactured in the state, Florida businesses, business with drug-free workplace program, or foreign manufacturers located in the state to determine the contract award, or, if these conditions do not exist or are the equivalent between two or more responses, will use toss of the coin.
 - In accordance with Florida Law and the Purchasing Directives, no purchase shall be divided or subdivided in order to circumvent the quote/bid/proposal requirements.
 - All formal solicitations issued by the University shall include the standard "University of Florida Acknowledgement" form.
 - Purchasing Services, at its sole discretion, shall determine whether a response meets or exceeds specifications.
 - The University shall reserve the right to reject any and all bids or proposals and such reservation shall be made part of the file.
 - The intended award for an Invitation to Bid, Request for Proposal or Invitations to Negotiate shall be posted electronically on the Purchasing Services' website for 72 hours excluding Saturdays, Sundays, or State Holidays.
 - In the case of extension errors, the unit price will prevail.
 - Withdrawal - A vendor may withdraw his or her bid or proposal in writing if done within seventy-two (72) hours of the bid or proposal opening, if the bid or proposal is clearly erroneous and it is withdrawn prior to final award or the purchase order being issued.
- The Purchase Order

The purchase order, initiates a contract by accepting legally the offer made by the vendor.

- Amount Only Purchase Orders
 - An Amount Only Purchase Order (AOPO) is a simplified method of filling urgent needs for small quantities of supplies or services by establishing open accounts with qualified suppliers. AOPO's are designed to expedite the acquisition of urgently, and/or frequently, needed supplies or services and to reduce administrative costs in accomplishing small purchases by eliminating the need for issuing individual purchase

orders. Purchasing Cards should be used in lieu of AOPO's whenever feasible.

- An Amount Only Purchase Order may not be used when:
 - a. The aggregate monetary value will exceed \$75,000 for any one type of item or service in any twelve month period (unless a bid is referenced).
 - b. Purchases are for capital (property > \$1000) items.
 - c. Purchases are of a personal nature.
 - d. The term is for longer than one calendar year (unless a bid is referenced).
 - e. The term will cross fiscal years utilizing annually appropriated funds.
- Requisitions are prepared by the using departments and forwarded to Purchasing Services. One requisition is required each fiscal year for each vendor. Requisitions using grant funds which do not expire on June 30, should show the expiration date of the grant. Each requisition submitted to establish an AOPO must contain the following information:
 - a. Description of supplies or services to be furnished by the vendor, limited to specific items or commodity groups or to all items that the supplier is in a position to furnish (see limitation on use above), vendor, chartfield information.
 - b. Suggested beginning and ending dates.
 - c. Dollar amount to be encumbered for anticipated expenditures sufficient to defray total anticipated charges.
 - d. List of names of individuals authorized to make purchases on the agreement.
 - e. Superseded purchase order number, if applicable.
- Purchasing Services will negotiate an agreement on prices, discounts, minimum purchases, and delivery with the supplier before the AOPO is issued.
- Orders against AOPO's may be made verbally by an individual authorized to place orders against the agreement. When placing an order, the individual should identify himself/herself and give the applicable AOPO purchase order number.
- The encumbrance of an AOPO may be increased or decreased by the using department by submitting a request for a change order to Purchasing Services.
- Change Request

A change request can be issued to modify quantities, unit price, due date, delivery schedule or location or to cancel the purchase order. Departments must initiate

requests for change orders in writing, or through the myUFL portal. Construction change requests, for 500 Fund series, are processed through the Construction Accounting department.

- Receiving

Receiving is required to be performed in the MyUFL system for purchases of capital assets. Although not required to be received online, all departments must develop a method of properly documenting the receipt for all goods and services. When entering a voucher applied against an encumbrance for capital assets, the MyUFL system will require that a receipt exists for the PO that is being paid or a match exception will be created (see "Match Exceptions" in section 1.4.13.8 (D)(2) of the Disbursement Directives and Procedures) Instructions on how to enter a receipt in MyUFL can be found at the following website:

<http://www.bridges.ufl.edu/training/docs/ReceivingItems.pdf>

- Claims for Loss or Damage in Shipment

Responsibility of Department receiving the shipment - Damage to shipments must be recorded and processed in accordance with regulations applying to common carriers. Visible damage shall be noted on the freight company's receipt at the time of delivery. Concealed damage must be officially reported to the freight company within fifteen calendar days after the company delivers the items to the University. Failure to report damages in this time frame will result in the University's loss of right to file a claim and collect for damages. Notify Purchasing Services in writing with a copy of the company's receipt, the purchase order number, the carrier's name, and the date of receipt.

- Receipt of Unsolicited Goods

Florida Statutes 570.545 states that when unsolicited goods are delivered, the person is not obligated to return the goods to the sender or make payment to the vendor. The law also states that unsolicited goods shall be deemed a gift and recipient may use or dispose of them in any manner without obligation to the sender.

- Right of Refusal

At the discretion of the department items may be refused for any of the following reasons: no purchase order, damage visibly perceived, or unsolicited goods.

13. Guidelines for Certain Types of Purchases

- Equipment on a Temporary Trial or Loan Basis

Occasionally, Vendors will loan to a researcher to test/try out their equipment. To protect the Vendors and the University of Florida, Purchasing Services suggests

either the department fills and signs an [Equipment Loan](#) form or inputs a "no charge" requisition into MyUFMarket requisitioning system. Purchasing Services needs the following information about the equipment: make, model, serial number and value of equipment, along with the contact information of the University personnel responsible for using the equipment.

- Purchases of Food Products, Room Rental and Entertainment
University policy prohibits the expenditure of public funds for food products, entertainment or similar items with the following exceptions:
 - The product is used directly in instruction or research.
 - The expenditure is specifically provided for in the terms of a contract, grant or donation. Terms of the award specifically provide for conferences/meetings in performance of project. The inclusion of these conferences/meetings must however, comply with regular travel reimbursement procedures for per diem pursuant to General Services (GSA) rates.
 - Short course or conference fees have been collected for the express purpose of paying for such items
 - Student functions, when approved by the Student Government Finance Office.
 - Direct payment of hotel rooms for individuals must have the prior approval of Purchasing Services. In order to make this type of payment, there must be a substantial savings to the University.

- Acquisition of Printing
Chapter 283, Florida Statutes imposes limitations on the purchase of printing or duplicating from off campus vendors. The following instructions apply to the purchase of printing:
 - The University shall purchase, when economical, recycled paper if and when recycled paper can be obtained that is of adequate quality for the intended purposes.
 - Preference Given Printing Manufactured in Florida Preference shall be given to bidders located within the state when awarding contracts to have materials printed, whenever such printing can be done at no greater expense than, and at a level of quality comparable to, that obtainable from a bidder located outside of the state.
 - Items to Be Included in Bids All bid invitations issued by the University for printing shall provide in the bid conditions that all cost for delivery, storage, freight, and packing are to be prepaid by the vendor, F.O.B. the address or addresses listed on the bid invitation unless otherwise specified.

- Agreements with Vendors for Private Publication of Public Information Materials:
 - a. The University may enter into agreements to secure the private publication of public information brochures, pamphlets, audiotapes, videotapes, and related materials for distribution without charge to the public. The University may:
 - I. Enter into agreements with private vendors for the publication or production of such public information materials, by which the costs of publication or production will be borne in whole or in part by the vendor or the vendor agrees to provide additional compensation in return for the right of the vendor to select, sell, and place advertising that publicizes products or services related to and harmonious with the subject matter of the publication.
 - II. Retain the right, by agreement, to approve all elements of any advertising placed in such public information materials, including the form and content thereof.
 - b. Any public information materials containing advertising of any kind must include a statement providing that the inclusion of advertising in such material does not constitute an endorsement by the University of the products or services so advertised.
- Information to Be Supplied with Requisition:
 - Printing requirements should be planned well in advance to permit purchase in compliance with the procedures described above.
 - Adequate information should appear on the requisition to insure that the required printing is obtained. The following list of terms may be of assistance in describing the printing desired: type style, type size, color of ink, size of paper, color of paper, weight of paper, number of pages, printing on one or both sides, printing on inside of cover, stapled, stitches, perforated, scored, folded, numbered, padded, packaged.
 - The requisition should also include the following information: date final copy will be available; date for receipt of proof, if required; date final delivery is required; point of delivery; person to be contacted in requisitioning department if additional information is required; and any other pertinent information.
 - If samples of similar printing jobs are available, copies should be forwarded with the requisition. Should samples not be available, one copy of the document to be printed should be forwarded if available.

- Information Technology Resources
 - Chapter 282, Florida Statutes require that information technology resources may only be acquired if approved by the agency Information Resource Manager (IRM) as part of the agency Information Resource Operating Plan or any supplement thereto. The University is committed to development, deployment and operations of a productive, cost-efficient and secure information technology environment in support of its missions. The University reviews information technology purchases as necessary to meet its commitments.
 - All software purchases of \$20,000 or more are subject to review. Software purchases are those with category codes beginning with 4323.
 - All hardware purchases of communications equipment, network equipment, telecommunications and video conferencing equipment are subject to review by the Office of Information Technology regardless of dollar value. Hardware purchases of network equipment, telecommunications and video conferencing equipment are those with category codes beginning with 4319, 4320, 4322, 4511 or 8611.
 - Requisitions containing items meeting the review criteria in the Information Resource Review Policy are forwarded to the Information Resource Manager (IRM) for review.
 - a. The IRM will complete the review within two (2) business days of receipt and notify the department submitting the requisition and Purchasing Services of the results of the review in writing.
 - b. If approved by the IRM, the requisition may be subject to additional review under other policies and procedures. If disapproved, the requisition will be returned to the requesting department for reconsideration.
- Term Contracts
 - Term contracts are indefinite quantity contracts whereby a contractor agrees to furnish an item(s) or services at a specified price, during a prescribed period of time (such as three, six, nine, or twelve months, or a specified date). The specified period of time or date completes such contracts.
 - A contract for supplies or services may be entered into for any period of time deemed to be in the best interest of the University provided the terms of the contract and conditions of renewal or extension, if any, are included in the solicitations and funds are available for the first fiscal period at the time of contracting. The performance of the University of any of its obligations under a multi-term contract shall be subject to and contingent upon the availability of funds appropriated by the Legislature of the State of Florida, the obligation of funds by the prime

funding agency, or otherwise lawfully expendable for the purposes of the agreement for the current and future periods.

- Prior to the use of a multi term bid/proposal, it shall be determined that:
 - a. Estimated requirements cover the effective period of the bid/proposal and are reasonably firm and continuing; and,
 - b. Such bid/proposal will serve the best interest of the University by encouraging effective competition or otherwise promoting economies in University purchasing.
- When funds are not appropriated or otherwise made available to support continuation of performance in a subsequent fiscal period, the order shall be paid only for supplies or services already received under the contract.
- Departments will be contacted if purchases of a recurring nature indicate that a term contract would be advantageous. Information as to specifications and estimated annual usage shall be supplied by the using department. Amount Only Purchase orders may be used to consummate purchases against these contracts. Departments may request assistance of Purchasing Services in establishing term contracts.
- The University may acquire any commodity which is available on any term contract or price agreement executed by the State Department of Management Services when such purchase is most advantageous to the University, with price, quality, performance and other factors considered. Any such purchases by the University are exempt from competitive bid requirements.
- Any article, except printing, furnished by PRIDE, a private not for profit corporation established pursuant to Florida Statutes 946.515, shall be purchased by the University from this corporation, when price and quality are determined to be comparable to articles required by the University.
- Maintenance or Service Agreement
 - Departments should carefully analyze all information and select among the following 3 equipment maintenance alternatives:
 - a. Assumed risk (self-insure) - where no contractual agreements are entered into and the department assumes the risk for repair or replacement of equipment.
 - b. Regular maintenance agreements - where department contracts for specific number of preventative maintenance visits and repairs plus parts where needed with various service providers.
 - c. University Managed Maintenance program - where department pays annual premium to contract vendor and contact service provider

of their choice for preventative maintenance and repair.

When considering these alternatives, consider the past experience of premium cost to maintenance and repair payouts. Also consider the value, age, and condition of the equipment as well as the frequency of use and critically of the equipment to the department.

- Requisitions for maintenance or service agreements on office machines or laboratory equipment must include the following information:
 - a. Location (room number) of machine and name of contact person.
 - b. Name brand, model number, serial number, and decal number of equipment.
 - c. Copier maintenance requisitions should also include the monthly base rate fee and the overage cost per copy.
 - d. Beginning and ending dates of maintenance period.
 - e. One copy of proposed maintenance agreement. Please note that the using department is not authorized to sign and approve vendor maintenance agreements. All agreements should be submitted with the requisition for signature and approval by Purchasing Services.

- Contractual Services
 - Contractual services are defined as the rendering of a contractor of its time and effort rather than furnishing specific commodities. This definition applies to individuals who are not performing the duties of a University position. The Consulting and Professional Worksheet for contractual services shall be signed by all parties and the purchase order issued prior to the rendering of any service. For the purposes of this section, Construction is not considered a service.
 - All procurement of contractual services in excess of \$75,000 shall be evidenced by a written agreement embodying all provisions and conditions of the procurement of such services. The terms and conditions of an agreement should be stated clearly and unambiguously in order that any person would have no difficulty in determining that the precise duties and obligations undertaken by the University are not in violation of any of the laws of the state relative to the expenditure of funds.
 - At the discretion of Purchasing Services, a contractual agreement may be required for supply items, particularly when the acquisition involves: a term contract, the furnishing of supplies with significant service and installation costs, the production of items from design or performance specifications, research and development equipment, high-value/unique/non-standard supplies and equipment, long lead time production items, or agreements involving partial payment schedules or definitive project phases.

- Agreements may be necessary in procurements less than \$75,000 when:
 - a. The requirement for an agreement is prescribed by a commanding authority, such as grant subcontracts.
 - b. Procurements where an agreement is necessary to protect the University's best interests.
 - c. Complex service contracts to establish the payment method, payment schedule, contract deliverables, or performance standards.
 - d. Required by the contractor.
- Only university personnel specifically delegated the authority, in writing, by the President are authorized to sign agreements and financially commit the University within the limits of their delegation. No department or individual, unless specifically delegated so, may sign any agreement or represent in any manner whatsoever to an individual or business that they possess the authority to bind the University. All agreements must be signed by the person with the delegated authority. All agreements are subject to legal review and approval prior to signature, except for those specific agreements, conditions, and circumstances assigned to Purchasing Services.
- Contracts
 - Contracts for commodities or contractual services or licenses shall consist of a purchase order or bilateral agreement signed by the President or designee prior to or within thirty (30) days of the goods or services being rendered by the contractor.
 - Any contract for the purchase of services or tangible personal property for a period of excess of one fiscal year shall include the following statement: "The State of Florida's and University's performance and obligation to pay under this contract is contingent upon an annual appropriation by the Legislature".
 - Extension of a contract shall be for a period not to exceed 12 months, shall be in writing, shall be signed by both parties, and shall be subject to the same terms and conditions set forth in the initial contract.
 - A contract may contain provisions for renewal. If the commodity or contractual service is purchased as a result of a competitive solicitation, the cost of any contemplated renewal must be included in the competitive solicitation. All contract renewals are subject to sufficient annual appropriations.
 - The President shall have the authority to enter into deferred payment agreements utilizing the State of Florida Consolidated Equipment Financing Program (CEFP). When a commodity contract requires deferred payments and the payment of interest under that program,

the contract will be submitted to the State of Florida Chief Financial Officer's Office for the purpose of pre-audit review and approval prior to acceptance by the University. No agreement shall establish a debt of the State or shall be applied to the faith and credit of the State; nor shall any agreement be a liability or obligation of the State except from appropriated funds.

- In order to promote cost-effective procurement of commodities and contractual services, the University may enter into contracts that limit the liability of a vendor consistent with section 672.719, F.S.
- The total value of the contract shall be the purchase price for the initial term plus all renewal costs.
- Carpet
 - All carpet installed at the University must meet the minimum following flammability requirements and all other safety tests associated with flooring installed at educational/healthcare institutions:
 - a. DOC FF1-70
 - b. ASTM E 84-80 Tunnel Test (75 or less flame spread rate)
 - c. Smoke Density Test-NBS-NFPA-258 (450 or less)
 - d. It is preferred that carpet meets the requirements of the CRI Green Carpet Testing Program and carpet cushion meets the requirements of the CRI Green program.
 - Physical Plant Division (PPD) is responsible for all facility work in E & G buildings. Health Science Center (HSC) Facilities' office is responsible for all facility work in the HSC buildings. IFAS Facilities' office is responsible for all facility work in the IFAS buildings. This includes carpet placement/replacement. Environmental Health & Safety (EH&S) is responsible for campus asbestos abatement. Each of the "Facility" offices is responsible for the administration and funding decisions concerning all carpet installations. Funding is provided by either them or University departments. Any required asbestos abatement activity related to "Facility" funded carpet removal is also funded by them. When existing carpet is glued to Vinyl Asbestos Tile (VAT), the VAT removal is part of the carpet removal as required by EH&S.
 - Departments wishing to replace carpet at their expense can utilize the University contacts or state contracts for this service by calling the appropriate facility office or PPD/Work Management Center. Funding is provided and contract administration is accomplished. If asbestos abatement is required during carpet removal for department-funded replacement, then the department is responsible for funding this abatement.
- Office Furniture

- Any office furniture purchased must be on a State Contract, or be equivalent or less in price to a comparable item on State Contract. A written justification must be submitted with the requisition when a department wants to purchase office furniture not on a State Contract.
- Any requisition to purchase a special chair because the prospective occupant has "back problems" must be approved by Environmental Health & Safety Department.
- When selecting furniture it is preferred that:
 - a. Purchases contain at least 10% postconsumer and/or 20% post-industrial material
 - b. Purchases contain at least 50% Forest Stewardship Council (FSC) certified wood
- At the discretion of Purchasing Services, furniture may be purchased up to the following guidelines without a written justification:
 - a. Office Chair - \$675
 - b. Sofa - \$1,400
 - c. Love Seat - \$1,100
 - d. Wing Back Chair - \$800
 - e. End Table - \$400
 - f. Coffee or 48" Conference Table - \$600
- Other furniture purchases under \$2500-The University has the option to purchase from non-contract vendors provided the cost is below \$2500.
- Portable room partitions are walls or dividers that are a substitute for standard walls. They are usually sold by furniture suppliers and can be wired for electrical/computer/telephone. Partitions serve a valuable function when correctly installed in "open concept" interior spaces. Partitions meeting any of the following conditions will be treated as real property, will require adherence to normal administrative approval rules, and will require the completion of a Minor Project/Construction Request ([Form 90](#)). This includes partitions that:
 - a. Impact Fire and Safety Codes in any way including fire sprinkler system/sprinkler locations and fire egress.
 - b. Are directly wired to the building for electricity (have a power panel) and/or telephone, data and video.
 - c. Exceed 72 inches in height.
 - d. Impact the existing lighting or the space to be partitioned.
 - e. Attach to or abut two or more existing walls.
 - f. Exceed 20 total linear feet.
 - g. Have doors.
 - h. Will affect the room numbering scheme.
 - i. All locks must be compatible with applicable master keying for the facility in which the partition is installed.

j. Partitions and partition installations must meet all fire, construction, and life safety codes.

- Trade in of University Owned Property
 - No University property may be removed or disposed of without first obtaining the approval of Asset Management Services.
 - Departments wishing to trade in equipment must submit a requisition for the commodity to be purchased and include the following information about the equipment to be traded: noun name, model number, serial number, and UF decal number. An approved "[Report of Survey](#)" form authorizing disposal by trade-in should be sent to Asset Management Services.
 - Purchasing Services will evaluate the price for the equipment that is to be traded following established purchasing procedures.
 - University Property Services will hold the Report of Survey until the new item is received and will process the trade-in when the new item is put on the Property Master File.
 - To determine the appropriate bid/quote level requirements involving trade-in property, the value of the trade-in property and the price of any new equipment is combined together (not deducted) to calculate the net total value of the transaction.
- Motor Vehicles
 - Purchasing Services has the authority to:
 - a. Establish standard classes of motor vehicles to be leased, purchased or used by University personnel.
 - b. Acquisition may be by purchase, lease, installment-purchase, loan, or by any other legal means and may include a trade-in.
 - Approval - The University shall not acquire any motor vehicle or watercraft through purchase, lease, or lease purchase without Purchasing Services approval.
 - Vehicles owned, leased or operated by the University are available for official University business only.
 - It is the intent of the University to purchase vehicles with the highest fuel efficiency and therefore lowest greenhouse gas emissions. This includes hybrid and alternative fuel vehicles. Purchasing Services maintains a listing of pre-approved recommended vehicles by vehicle type and class to assist departments with choosing a vehicle for purchase. See the purchasing website for additional information on [vehicle purchases](#). This directive applies to all automobile and truck vehicles including used vehicles. Research vehicles may be granted an

exemption by the Division of Sponsored Research if the cost differential or lead time would negatively impact research.

- The requesting department shall submit a requisition to Purchasing Services complete with the following information:
 - a. A requisition containing the year, make, model, engine type (Hybrid/FFV/Diesel/Electric), color (if known), VIN (if known), and if applicable, UF Decal number of trade-in vehicle for Asset Management records.
 - b. Vehicle identification information for the vehicle to be replaced or written justification from a Dean or VP for adding a vehicle to the fleet.
 - c. Quote from the dealer including a detailed list of vehicle specifications. (Additional quotes will be required if the vehicle is not purchased using publicly solicited contract.)
 - d. A justification regarding the particular type/style of vehicle selected. Justification should outline the specific use of the vehicle and explain the need of any extra features/optional equipment above and beyond the base vehicle configuration.
- Environmental Health and Safety Division will receive notification of every vehicle purchase to ensure proper training, if applicable, has been completed. Operators of the following vehicles are required to complete training:
 - a. 15 Passenger Vans
 - b. Agricultural Farm Equipment
 - c. Agricultural Tractors
- Upon receipt of the required document, Purchasing Services shall complete the acquisition following established purchasing procedures. Physical Plant's Motor Pool Division or IFAS Office of Facilities Planning and Operations will be responsible for processing the vehicle into the University's fleet pool.
- Radioactive Materials and Radiation Emitting Equipment
Radioactive materials and radiation emanating equipment (lasers and X-rays) are controlled by the University's Radiation Central Office (RCO) at Environmental Health and Safety. Approvals for the purchase of radioactive materials and radiation emanating equipment must be received by the RCO in advance. Only the RCO may receive and transport radioactive substances. The using department must comply with all University guidelines and directives regarding the safety, storage and disposal of these materials.
- Controlled Substances
Controlled substances may be ordered by licensed personnel and must provide a copy of the license along with the requisition to Purchasing Services. The using department must comply with all University guidelines and directives regarding the safety, storage and disposal of these materials.

- Live Animals
Live animals may only be ordered with the approval of the Department of Animal Care Services. The using department must comply with all University guidelines and directives regarding the safety, and handling of live animals.
- Hazardous Materials and Equipment
 - All hazardous supplies, equipment and services are controlled by Environmental Health and Safety (EHS) and must be approved by them prior to purchase. These include:

All renovation and construction	Ice machines
Air purifying respirators	Isolation glove chamber
Anaerobic chamber	Gas chromatographs
Asbestos decontamination or removal	Kitchen cooking appliances
Autoclave and sterilizer	Kitchen exhaust systems
Autopsy supplies and equipment	Lab oven or furnace
Bacteria Fungi	Lab vectors
Bench top fume collection cabinets	Lasers
Biological safety cabinets	Liquid scintillation counter
Boilers & pressure vessels	Microwave ovens for labs
Bulk storage tanks	Ozone generators
Cleaning of kitchen exhaust systems	Personal monitoring or detection equipment (confined space meters, gas meters, survey meters and dosimeters, etc.)
Compressed gas cabinets	Portable air cleaning devices
Disaster recovery services	Radioactive materials
Dioxins and Tri-, Tetra- and Pentachlorophenol	Refrigerators & freezers for lab use
Electron Microscopes	Repair of equipment that is required to be sent off campus (certification of cleaning and decontaminating will be required)
Environmental growth chamber	
Explosives and fireworks	
Eyewash stations and safety showers	Self contained breathing apparatus

Fall protection devices (harnesses & lanyards)	Tank and Cylinder and accessories
Fire fighting equipment	Toxins
Fire suppression systems	Viruses
Food service equipment	Walk in refrigerator or coldroom
Fume hoods	X-ray machines
Hazardous waste disposal	

- The using department must comply with all University guidelines and directives regarding the safety, storage and disposal of hazardous materials ("Hazmat").
- Moving Expenses
 - Moving expenses for Faculty, Teams, and University Support Personnel System employees must be approved in advance by a Dean or Director. Only direct payments to University contract moving vendors are authorized. Authorized expenses include packing, shipping, and storage of household goods or a mobile home and reasonable expenses incurred for moving an automobile. Charges for unpacking and extra insurance are not allowed and must be paid separately by the party being moved at the time of delivery. Household goods are the personal effects and property of a current or prospective employee. Mobile home is any vehicle that is used as a primary residence by a current or prospective employee.
 - Not included in "Moving Expenses-Household Goods" are professional equipment and/or books necessary for job performance and housed at the University. Requests for moving laboratory equipment and professional books should be submitted on a separate line item of the requisition. A detailed inventory of equipment being moved must be completed and submitted to the Risk Management Office prior to the move, for insurance purposes.
 - a. Requesting Department Responsibility - Submit to the Purchasing Department the requisition. The requisition for the move must include: name of the new hire, the current address or address where the goods will be moving from, the anticipated date of the move, the telephone number, and email address where the individual can be contacted. Depending on the availability of funds, the department may agree to pay the entire amount of the move, or agree to pay a fixed amount with the employee paying the remainder. In this instance, the purchase order will be for that portion of the fixed amount authorized by the

department. The employee must pay the difference of the actual cost of the move when the household goods arrive at their destination.

- Purchasing Services' Responsibility - To assign the move to a contracted carrier and issue the purchase order. Assist the department and employee regarding the move.
- Cellular Telephones
See the Cell Phone and Wireless Communication Device [Directive](#).
- DSL or Cable Internet Connections in Personal Residences
It is Finance and Administration's opinion that a DSL or cable internet connection at a personal residence constitutes an employee perquisite and should be processed as such through the Division of Human Resources. Please see the HR website at for complete [instructions on perquisites](#).
- General Safety Supplies, Equipment and Services
All general safety supplies, equipment and services need prior approval by Environmental Health and Safety (EHS) before purchase. They include:
 - Defibrillator or AED's
 - Ergonomic support aids
 - Respiratory dust masks
 - Insurance

14. Leases

- Equipment Leases
 - Leases, including month to month leases and all other leases of equipment regardless of the period of time, are subject to the review and approval of Purchasing Services.
 - Interest on leases or deferred payment commodity contracts is defined as a commodity and is subject to the bid requirements if the interest exceeds \$75,000 over the term. Purchasing Services may also request competitive quotes on lease rates and terms.
 - Requesting Department's Responsibilities The requesting department shall be responsible for submitting a requisition for the lease or installment purchase of equipment to Purchasing Services with the following information:
 - a. Equipment specifications,
 - b. Original agreement with all the terms and conditions
 - c. Lease versus purchase cost analysis,
 - d. A statement from the Department Chair, Dean, or appropriate Vice President guaranteeing that funds will be provided during the entire term of the lease.

- The lease of equipment is subject to the Purchasing and bid procedures contained herein. All leases shall contain a cancellation clause, and an availability of funds clause. Leases may contain renewal options, if appropriate. Leases of equipment are generally of three types:
 - a. Lease with no provisions
 - b. Lease with purchase option credits - provides for a percentage of monthly lease payments to be applied toward purchase in the event the option to purchase is exercised. Lease payments normally include maintenance.
 - c. Installment Lease Purchase (No leasing provisions included) - provides for the title and ownership to the University upon installation. The acquisition is made over a period of time, such as 48 months, by monthly payments. Maintenance is extra and, if required, is another line item on the requisition. A copy of all back-up documents with the purchase order number indicated must be forwarded to Property Accounting.
- Consolidated Equipment Financing Program (CEFP) Lease Agreements - Purchasing Services may submit requests for lease purchase agreements to be financed under the CEFP in the Department of Financial Services. Upon receipt of approval by the CEFP, department will submit a zero amount requisition to the supplier furnishing the equipment with required financing language.
- Real Property Leases
Leases of real property, office space, and storage units require advanced review and approval from Purchasing Services. The process is outlined in the Florida Administrative Code, [section 6C1-3.025](#).

15. Construction

- General
 - By definition, minor projects are those building projects in which basic construction costs are estimated to be \$1,000,000 or less. Major Projects are those building projects that are estimated to be more than \$1,000,000.
 - A University of Florida Minor Project/Construction Permit ([Form 90](#)) is required for building projects that cannot be classified as simple maintenance or major construction.
 - If a University of Florida Minor Project/Construction Permit ([Form 90](#)) has been approved and the project is to be placed on bid to outside vendors, an email or requisition should be submitted to the Purchasing Division with plans, specifications and an approved permit attached.

- Drawings and specifications must be clear and inclusive for bidding purposes. If inadequate for bidding purposes, the specifications will be returned to the department, in which case the department should seek assistance from their Facilities Management group.
- All requisitions for alteration, renovation or construction projects in E&G buildings not accompanied by a University of Florida Minor Project/Construction Permit ([Form 90](#)) must be reviewed by the Physical Plant Work Management Office and the Division of Environmental Health & Safety to insure that safety requirements and the provisions of the fire code are being met, before a purchase order is processed.
- Bid Bonds/Bid Deposits, Performance and Payment Bonds and Certificates of Insurance:
 - a. The successful bidder must additionally furnish a payment and performance bond as a security for faithful performance on contracts over \$200,000. Contracts of less than \$200,000 but more than \$100,000 may require a payment and performance bond at the discretion of the Purchasing Director. Contracts of less than \$100,000 do not require a payment and performance bond. When required, surety of such bond shall be in an amount equal to the contract. The attorney-in-fact who signs the bond must file with the bond a certificate and effective dated copy of power of attorney. Bonds will be accepted only from bonding companies licensed to do business in the State of Florida.
 - b. If a firm is unable to obtain a Payment and Performance Bond, a Cashier's Check or acceptable Financial Institution's Letter of Credit may be accepted in lieu of the required bond. All Letter-of-Credit approvals must be reviewed by the University General Counsel.
 - c. The successful bidder must also furnish an Insurance Certificate covering workers' compensation, property liability, property damage and vehicle liability insurance.
- If partial payments are to be made to the contractor; this provision must be provided for in the purchase order. Partial payments are accomplished by the completion of a Certificate of Partial Payment, which is forwarded to the vendor with the purchase order.
- Professional and Design/Build Services
The acquisition of Professional and Design/Build services are covered under University of Florida regulations, Florida Administrative Code [6C1-3.070](#).
- Construction Management Services
The acquisition of Construction Management Services are covered under University of Florida regulations, Florida Administrative Code [6C1-3.071](#).

- Construction Contract Bidding and Award (contractor)
The award of construction contract bidding is covered under University of Florida regulations, Florida Administrative Code [6C1-3.072](#).
- Construction Bid Protests (contractor only)
The protest of construction contract bidding is covered under University of Florida regulations, Florida Administrative Code [6C1-3.073](#).
- Evaluations of Professional Service Providers, Design/Builders, Construction Managers and Contractor; Disqualification Procedure
The evaluation of Professional Service Providers, Design/Builders, Construction Managers and Contractor; Disqualification Procedure is covered under University of Florida regulations, Florida Administrative Code [6C1-3.074](#).
- Procedures for Payment under Unbonded Construction Projects
The procedures for Payment under Unbonded Construction Projects is covered under University of Florida regulations, Florida Administrative Code [6C1-3.075](#).

16. Sustainable Purchasing

- **Purpose**
 - The purpose of this policy is to support campus sustainability at the University of Florida and to provide guidelines, information, and resources in procuring products that will minimize negative impacts on society and the environment to the greatest extent practicable.
- **Responsibilities of Departments**
 - Develop and maintain information about environmentally and socially preferable products. Departments should use the list composed in this document as a guideline and may add or modify the list as needed.
 - Inform employees of their responsibilities under this policy; provide them with information about sustainable procurement opportunities. Check the [Purchasing](#) web page for frequent updates on vendor commitments to sustainability, including new annual contracts and participation in vendor shows.
 - Submit new ideas, problems or concerns to Purchasing (352) 392-1331 or e-mail purchasing@ufl.edu.
- **Best Practices and Procurement Strategies**
 - **Reduce waste at the point of purchase.**
Faculty, staff and students can help achieve the university's waste reduction goals by practicing the three R's: reducing, reusing, and recycling. Priority should be given to reducing waste upstream by purchasing products made from recycled material that can be reused or recycled.

- Office paper, letterhead stationery, envelopes, and business cards made from recycled paper
- Office supplies
- Recycled, remanufactured, or re-filled toner cartridges
- Furniture made with a percentage of postconsumer or postindustrial material and/or FSC 50% certified wood

To reduce disposal costs and waste, choose items that can be remanufactured, recycled, or composted. Many products made from recycled materials are available and are being included in the University of Florida contracts.

Contract information is available from the [Purchasing](#) website under contracts and UF Pricing.

- **Purchase durable and reusable goods.**
Using life-cycle cost analysis, rather than automatically choosing goods with the lowest purchase price, can help departments identify the best long-term value. Factor in a product's estimated life span as well as its energy, maintenance, consumable supplies and disposal costs.
 - Consider durability and reparability of products prior to purchase.
 - Invest in goods with extended warranties. Conduct routine maintenance on products/equipment.
 - Save money and minimize waste by eliminating single-use items, such as non rechargeable batteries, in favor of rechargeable batteries. Use rechargeable cartridges.
- **Lease and rent when appropriate.**
Consider an operating lease or rental rather than a purchase or capital lease. Lease and rental contracts give vendors the responsibility for the upkeep of goods such as computers and copiers, and for managing them at the end of their useful life. Businesses that lease equipment tend to manufacture more durable items, salvage reusable parts, refurbish, recycle, or donate used equipment that can no longer be leased. Renting is a cost-effective option for short-term equipment needs.
- **Specify product and packaging take-back.**
 - Increasingly, product vendors are offering to take back the products they sell when they become obsolete. By utilizing vendors who offer an Extended Product Responsibility (EPR) program, especially take-back, recycle, and disposal programs, departments are ensured equipment and products are disposed of properly whether recycled, donated, refurbished or disposed of without the added cost.
 - Other vendors will take back used items, such as carpeting and toner cartridges, when purchasers buy new products. For example,

several carpet manufacturers have invested in sophisticated recycling facilities that turn old carpet into new carpet or other goods and toner cartridges are disposed of properly or sent to be recharged and sold at a lower cost.

- Departments should require vendors to assume responsibility for some of their shipping materials, such as wooden pallets and excess packaging materials. When ordering large furniture or computer shipments request products ship blanket-wrapped or using reduced packing material.

- **Buy goods in bulk or concentrated form.**

This practice can significantly reduce the packaging associated with lower product quantities and save costs. Carefully estimate demand when purchasing in bulk; purchasing more than is needed can create excess that becomes waste.

- **Manage surplus effectively.**

The University of Florida can reduce waste by eliminating excess purchases. Reviewing past needs can minimize the procurement of unneeded items. Clean out your office supply cabinet and post reusable items for UF Departments on GatorList.net or donate to local non-profit organizations such as Alachua County's Tools for Schools. Departments should utilize Asset Management Services for disposing of unwanted, out-dated property. Asset Management will effectively redistribute, recycle, or dispose of surplus property by bidding it out over the Internet through surplus on-line bids, police auctions, property warehouse, or federal warehouse. For more information see Asset Management Services Web Site: <http://fa.ufl.edu/am/surplus/>.

- **Procure commodities that are certified to meet sustainability standards.**

Paper and Forest Products:

- Forest Stewardship Council - www.fsc.org
- Chlorine Free Products Association - www.chlorinefreeproducts.org

Electronics and Appliances:

- Energy Star - www.energystar.gov/purchasing
- Electronic Product Environmental Assessment Tool (EPEAT) - www.epeat.net

EPEAT has tiers of environmental performance. UF's bundled computers will meet at least the EPEAT silver standard. UF's preference is that when the certification is available on the products being purchased, all purchases of computers and monitors meet or exceed the silver EPEAT certification.

Cross-sector: (examples: cleaning supplies)

- Environmental Choice - www.environmentalchoice.com
- Green Guard - www.greenguard.org
- Ecologo - www.ecologo.org
- Green Seal - www.greenseal.org
- Scientific Certification Systems - www.scscertified.com

Carpet, Adhesives and Cushion:

- CRI Green Seal and Green Seal Plus - www.carpet-rug.org

Renewable Energy:

- Green-e - www.green-e.org

Building Practices and Indoor Air Quality:

- Green Building Council (LEED) - www.usgbc.org/leed

Food:

• USDA Organic, Food Alliance Certified, Rainforest Alliance Certified, Protected Harvest Certified, Fair Trade OR Marine Stewardship Council's Blue Eco-Label

- **Procure remanufactured goods and use refurbishing services.**
It is generally much less expensive to buy remanufactured goods such as remanufactured toner cartridges, or to use refurbishing services for computer upgrades, carpet repair, and furniture reupholster, than to buy new items. "Recharged" toner cartridges typically save departments 30 to 50 percent per sheet of paper. Remanufactured items should require no sacrifice in performance. Check with Purchasing for current contracts in place for remanufactured products.
- **Purchase goods containing fewer toxic constituents.**
By procuring goods with fewer or no toxic chemicals, departments can reduce their hazardous waste disposal, future liability concerns, and the risk of occupational exposure and spills. Low-toxicity products such as mercury-free medical supplies, low mercury light bulbs/lamps with a content of 90 picograms per lumen-hour or less, printing ink low in volatile organic compounds (VOCs), and chrome and chlorine free cleaning supplies are increasingly available and cost-competitive. See the Cross-sector certifications to help selecting products. The University prefers all cleaning products purchased are either Green Seal or EcoLogo certified.
- **Reduce paper use.**
 - Set all printers, copiers, and fax machines to the default duplex mode if the function is available.
 - Purchase office equipment that has duplex capability.

- Purchase paper with recycled content
 - Utilize technology to send and store information electronically.
 - Utilize internet fax when available.
 - E-mail document files instead of faxing hardcopies.
 - Instead of having forms preprinted and stored, fill out forms online and print as needed when available and feasible.
 - Store documents electronically instead of storing hard copies.
- **Current Guidelines in Place**
 - All University of Florida personnel will purchase recycled and environmentally preferable products whenever practicable.
 - University of Florida Departments will purchase hybrid or alternative fuel vehicles.
 - The University of Florida will have a recycle container available within a reasonable distance of soda machines and in all dining establishments where canned or bottled drinks are served:
<http://www.ppd.ufl.edu/grndrr.htm>. Contact Physical Plant's Solid Waste Coordinator at 392-7396 or 392-1148 x 301.
 - University of Florida should promote the use of recycled and other environmentally preferable products by publicizing its sustainable procurement program. Materials produced for advertising, conferences, trade fairs, press releases, and other communications with clients and citizens can make reference to the University of Florida's commitment and leadership in the use of recycled and environmentally/socially preferable products.
 - The University Purchasing and Disbursements Department will make every effort to secure contracts with vendors that are socially and environmentally conscientious, and certified green whenever practicable.
- **Purchasing and UF's Zero Waste by 2015 Goal**
 - Purchasing recyclable or products made out of recycled material is only part of the life cycle, you must recycle whenever possible. If you are not sure about the different recycling programs on campus, visit the Physical Plant Division, Grounds Department website
<http://www.ppd.ufl.edu/grounds-refuse.html> or call (352) 392-7396.
- **Environmentally Preferable Purchasing (EPP) Resources**
 - Resources:
 - Center for a New American Dream's Procurement Strategies (www.newdream.org/procure)
 - EPA's EPP Web Site (www.epa.gov/oppt/epp)
 - EPPNet (www.nerc.org/eppnet.html)

- INFORM (www.informinc.org)
- Office of the Federal Environmental Executive (www.ofee.gov)
- Examples of environmentally preferred products:
 - Recycled paper and paper products
 - Remanufactured laser printer toner cartridges
 - Energy Star Rated computers and appliances
 - Rechargeable batteries
 - Re-refined lubrication, hydraulic oils, and antifreeze
 - Recycled plastic outdoor-wood substitutes including plastic lumber, benches, fencing, signs and posts
 - Recycled content construction, building and maintenance products, including plastic lumber, carpet, tiles and insulation
 - Re-crushed cement concrete aggregate and asphalt
 - Cement and asphalt concrete containing glass cullet, recycled fiber, plastic, tire rubber, or fly ash
 - Compost, mulch, and other organics including recycled biosolid products
 - Re-manufactured and/or low or VOC-free paint
 - Cleaning products with lowered toxicity
 - Energy saving products
 - Waste-reducing products
 - Water-saving products
- **Socially Responsible/Ethical Purchasing Standards**
 - In demonstrating a commitment to sustainability and seeking to ensure safe and healthy workplaces for the people who make products for the University of Florida, purchasers should strive to ensure that the products they purchase meet International Labor Organization (ILO) manufacturing standards and Fair Trade Labeling standards.

Learn more about the importance of ethical purchasing:

- Verité (www.verite.org)
- Workers Rights Consortium (www.workersrights.org)
- Silicon Valley Toxics Coalition (svtc.igc.org/svtc/)
- **Glossary**
 - **Environmentally Preferable Products** are products that have a lesser impact on human health and the environment when compared with competing products. This comparison may consider raw materials acquisition, production, manufacturing, packaging, distribution, reuse, operation, maintenance, or disposal of the product.
 - **Green Purchasing** means purchasers take into consideration the environmental impact of products when making purchasing decisions,

giving preference to more environmentally friendly products when quality and price are equal or superior.

- **Recycled Products** are products manufactured with waste material that has been recovered or diverted from solid waste. Recycled material may be derived from post-consumer waste (material that has served its intended end-use and been discarded by a final consumer), industrial scrap, manufacturing waste, or other waste that would otherwise have been wasted.
- **Sustainability** means meeting today's needs without compromising the ability of future generations to satisfy their needs.
- **Waste Prevention** means any action undertaken by an individual or organization to eliminate or reduce the amount or toxicity of materials before they enter the municipal solid waste stream. This action is intended to conserve resources, promote efficiency, and reduce pollution.
- **Reuse** means repairing what is broken or giving it to someone who can repair it or use it in its current state.
- **Reduce** means using less of products and utilizing other means of doing business when available to reduce the amount and toxicity of trash discarded.
- **Recycle** means to reprocess and reuse used material.
- **Life Cycle Evaluation** is an evaluation of the major environmental impacts in each life-cycle stage of a product category including resource extraction, production, distribution, use, and eventual disposal or recycling. The evaluation considers energy, resource use, and emissions to air, water, and land, as well as other environmental and health impacts. The purpose of this evaluation is to identify significant life-cycle stages to be addressed.
- **Life Cycle Cost Analysis** is an economic evaluation technique that determines the total cost of owning and operating a building or equipment.
- **Rechargeable** means to replenish the amount of electric power in something, especially a battery.
- **Extended Producer Responsibility (EPR)** is vendors taking on the responsibility for the environmental impacts of their products through the entire product's life cycle; especially the take-back, recycle, and disposal programs.
- **Leasing** is a legal rental contract allowing somebody exclusive possession of another's property for a specific time in return for a payment.

- **Certification** an official document or seal providing evidence and details of something that is authentic and verified by a third party.
- **Exemptions**
 - Nothing in this directive should be construed as requiring the purchase of products that do not perform adequately or are not available at a reasonable price.