Subject Area

Request for Procurement Exception to Affordability & Efficiency Task Force Mandate

Introduction:

Ohio Task Force on Affordability and Efficiency in Higher Education, with the Board of Trustees ratification, has mandated that all purchases be made with suppliers under contract with Ohio University, either through an award from a University public competitive bid or one conducted by a purchasing consortia in which Ohio is a member. These suppliers are known as Preferred Suppliers. All purchases, to extent available, should be purchased from Preferred Suppliers for expense categories that have been addressed by the mandate. In the rare event that a good or service requirement cannot be met by a Preferred Supplier, an exception is to be requested. All exception requests will be reviewed by the Planning Units Chief Financial Administrative Officer (CFAO). The CFAO has the authority to grant or deny the request. It is highly recommended that the planning unit use the Exception form to document the need and business justifications for the approved exception. Audits will be performed and CFAO’s must justify any exceptions granted.

Process Flow Diagram:
Process Steps:

1. Search for required item from Preferred Supplier, if expense category is part of the A&E mandate
   a. Search Preferred Supplier List
   b. Search Catalogs in BobcatBUY (BCB)
   c. Inquire with Preferred Supplier Account Manager
   d. Request help from Procurement

2. After reasonable research does not return desired result
   a. If purchase over $50,000
      i. Request RFP from Procurement
   b. If purchase is under $50,000
      i. Submit requisition and complete the compliance questions to request procurement exception.
      ii. Requisition and justification will be reviewed by Planning Unit CFAO
         1. If CFAO denies request, return to step 1 to look for an alternative item from Preferred Supplier
         2. If CFAO approves requisition is processed by Procurement and a PO is created.

We have created a Request for Procurement Exception form for communicating and documenting your request with the CFAO. Although we highly recommend that you use this form and retain for your records, it is not required. The Internal Audit team will use the compliance questions in BobcatBUY to review exceptions and they will request documentation for the exception.

3. If your purchase is using federal funds, and the purchase amount is greater than $3500 but less than $50,000, in accordance with Uniform Guidance, 3 quotes must be attached to the requisition to document and support the vendor selection for your purchase. If a preferred supplier is used, no additional quotes are required.

Links and Forms used in process:

1. https://www.ohio.edu/finance/purchasing/affordability-and-efficiency
2. https://www.ohio.edu/finance/purchasing/preferred-suppliers
3. https://www.ohio.edu/finance/forms
4. https://sciwm-sso.ohio.edu/sciquest/index.jsp