

Davenport University Procurement Policy

POLICY TITLE: Procurement Policy

POLICY OWNER: FINANCE

EXECUTIVE SPONSOR: EVP/CFO

DEVELOPMENT DATE:

APPROVAL DATE: March 6, 2024

EFFECTIVE DATE: April 4, 2024

UPDATED:

APPROVED BY: Davenport University Board of Trustees

Purpose: The purpose of this University Procurement Policy is to establish guidelines and procedures for the acquisition of goods and services necessary for the university's operations regardless of funding sources. This policy applies to all university departments, employees, and individuals involved in the procurement process.

Responsibility: The Davenport University Procurement Committee (DU Procurement) is responsible for setting the procurement policy and procedures for the entire University and ensuring that the policy and procedures are followed consistently by all University employees and departments. This includes the responsibility for defining, implementing, regulating, modifying, and communicating the University's procurement policy and procedures to the University community. Furthermore, DU Procurement is responsible to assist all procurement decisions throughout the University.

Members of the Procurement Committee (DU Procurement):

Executive Vice President/Chief Financial Officer

Executive Director of Risk Management

Director of Finance

Vice President of Finance

Director of Accounting

Manager of Procurement

University employees are responsible and will be held accountable for following the policy and procedures set forth by DU Procurement when executing a purchase for a good or service that will be used in University operations. Although emergency or atypical situations may occur, employees should solicit the input of the DU Procurement Committee prior to taking a course of action that deviates from Davenport's procurement policy and procedures.

All non-procurement card program purchases must be linked to a reviewed, approved and signed contract/agreement if applicable.

Davenport University is not obligated to pay for unauthorized purchases. Unauthorized purchases may become the personal obligation of the individual who made the purchase, and could lead to disciplinary action, up to and including termination. Procurement privileges may be rescinded from individuals who make unauthorized purchases.

Procurement Principles

Transparency and Fairness: All procurement activities will be conducted in an open and fair manner to encourage healthy competition and ensure equal opportunities for suppliers.

Compliance: All procurement activities must comply with relevant laws, regulations, and university policies, including, but not limited to, accreditation, NCAA, and grants.

Value for Money: The primary consideration is for all university departments to obtain the best value for the university concerning quality, price, and sustainability.

Ethical Practices: All involved parties will act with integrity, honesty, and ethical behavior throughout the procurement process and be fiscally responsible while following the [DU Vision, Mission and Values](#).

Conflict of Interest: To uphold this policy and prevent any conflicts of interest, all involved parties are required to disclose any relationships or circumstances that could influence or appear to influence their decision making in the procurement process.

Budgeting and Planning: Departments are required to plan and budget their procurement needs in advance. This includes identifying requirements, specifications, and estimated costs but does not constitute advanced approval to spend funds.

Data Security: Ensuring that the vendor, service provider or supplier adheres to information security, data privacy best practices and complies with federal and state regulations.

Approval Process: All non-procurement card program procurement activities will be authorized in advance and in accordance with established thresholds. Higher-value procurement will require approval from designated higher authorities or procurement committees (INSERT APPROVAL workflow document).

Contract Negotiation and Management: Consistent with the Contract Management Policy, contracts will be negotiated fairly, and terms should be clearly defined. Once awarded, contracts will be managed to ensure compliance and timely delivery.

Supplier Diversity and Sustainability: The university encourages the use of diverse suppliers and prioritizes sustainable and environmentally friendly practices that will provide the greatest overall value to the University.

Roles and Responsibilities

DU Procurement: Responsible for overseeing the procurement process, ensuring compliance, and guiding departments on procurement policies.

Department Heads/Managers: Responsible for identifying procurement needs, initiating requests, and ensuring adherence to the procurement policy.

Suppliers: Expected to comply with the university's standards, policies, and laws.

Delegated Authority: (to designated personnel)

The University's procurement approach is largely dependent upon the nature of the purchase being made. In general, the approach is dependent upon the type of item (spend type) that is being acquired. All purchases are initiated by University employees within budgeted limits and with either the procurement card or purchase order and proper approvals in advance of purchase. The DU Procurement Committee is responsible to assist all procurement decisions throughout the University.

The following departments with the assistance of the DU Procurement Committee, are authorized to solicit requisitions to procure goods/services:

Marketing and Advertising: The approach for marketing and advertising purchases will be managed by the marketing department in conjunction with the support of the DU Procurement Committee. This will be a combination of competitive bidding/contract based and preferred suppliers via purchase order (PO).

Facilities: Original construction, repairs, maintenance, Furniture, Fixtures, and Equipment, utilities and rent will be managed by Facilities. Funds will be disbursed as specified in the campus operating budget using preferred suppliers via PO. Capital items will be managed by Facilities with the active involvement of the DU Procurement Committee through competitive bidding/contract-based procurement.

Information Technology (IT): The approach for information technology purchases will be managed by the IT department in conjunction with the support of the DU Procurement Committee and primarily through competitive bidding/contract based.

Campus Store: The ongoing procurement approach is determined by the Campus Store and the DU Procurement Committee. This will be a combination of competitive bidding/contract based and preferred suppliers via PO.

Benefits: All benefits and related contracts will be managed by the University's Human Resources department with the support of the DU Procurement Committee and primarily through competitive bidding/contract based.

Professional Services: Professional services-related purchases will be managed decentrally by the initiator of the purchase primarily via PO. The DU Procurement Committee to provide leadership on a consulting basis.

Travel and Entertainment: The majority of travel and entertainment purchases will be decentralized and procurement card based. The DU Procurement Committee will manage the approach to such pro-card purchases through the University's pro-card procedure and overall management of the University's pro-card program. The DU Procurement Committee may further manage certain segments of travel-related purchase via contract and preferred suppliers.

Office Supplies: Office supplies will be purchased via pro-card or on-line, utilizing preferred suppliers. The DU Procurement Committee will manage the approach to such purchases.

Postage: Postage will be managed on an as-needed basis by the requesting individual primarily via pro-card or, for larger scale requirements, via PO.

Dues and Memberships: Decentralized procurement approach, primarily via pro-card.

Record Keeping and Reporting

All procurement activities will be documented and maintained for audit and transparency purposes. Regular reports on procurement activities may be required to ensure compliance.

Training and Compliance

Annual mandatory training and awareness programs will be conducted to educate staff on the procurement policy, procedures and any updates or changes.

Review and Addendums

This policy will be periodically reviewed and updated as necessary to reflect changes in laws, regulations, or best practices.

- PUR-02 Manage Suppliers
- PUR-03 Procurement Card
- PUR-04 Process Purchase Requisitions
- PUR-05 Competitive Bidding (RFP/RFQ)
- PUR-06 Supplier Agreements (Contracts)
- PUR-07 Create and Maintain Purchase Orders

PUR - XX Banner Approval Level Ques

PUR - XX Diverse Supplier contractor/supplier

Enforcement

Violations of this policy will result in disciplinary actions or sanctions, in accordance with university guidelines and applicable laws, up to and including termination of employment.

This University Procurement Policy will be communicated to all stakeholders and made accessible through the university's official channels.