



Purchasing Policies and Procedures Index

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Purchasing Policies and Procedures

I. Background

The Purchasing Department's main function is the procurement of equipment, supplies, and services at the lowest cost consistent with quantity, quality, and availability of the items at the time of purchase. In applying policy, the cost of the purchase and the delivery time required by the using department will be considered. At least three (3) verbal competitive quotes and/or bids will be solicited whenever practical and are required for purchases exceeding \$2,000. Written competitive bids are required for all purchases for dollar amounts over \$5,000. A Request for Proposal (RFP) is required for purchases of amounts over \$25,000 and approval by the Finance Committee for the Board of Trustees is required for all purchases over \$125,000.

The Purchasing Department is the primary agency authorized to make commitments for University purchases. It is the responsibility of the Purchasing Department to conduct the purchasing functions in a manner that results in the best value for the University with due regard to price, quality of products/service, contracting party, other relevant factors, and in accordance with the Code of Ethics advocated by the National Association of Educational Procurement. Purchases for which University funds are to be used, except those specifically identified within this policy, will be made by the Purchasing Department.

The Objectives of the Purchasing Department include the following:

- To provide assistance to students, faculty, and staff in the procurement of required materials and services.
- To obtain the maximum value for each dollar of expenditure.
- To purchase the materials and services that best meets the needs of the University.
- To ensure the procurement activity is conducted in a business-like manner and meets internal control standards acceptable by our internal and external auditors.
- To conduct business in an ethical manner, declining personal gifts and gratuities.

[ORU is exempt from state sales tax in Oklahoma. Tax exempt certificates should be used only when the purchase is being made directly for the University. ORU's exemption does not extend to student groups or organizations unless they are acting on behalf of the University. Appropriate authorization from the Dean of Students Office must be obtained for such purchases.]

II. Policies

A. Authority to Purchase

The authority to enter into a purchase agreement is vested in only those individuals approved by the Board of Trustees (or “Board”). The President, Executive Vice President and Chief Financial Officer (CFO), the Executive Vice President and Chief Operations Officer (COO), and the Provost are the positions approved by the Board to contract, sign and contractually obligate the University for goods or services. The following policies outline the procurement process.

Procurement Process

Purchase requisitions, orders, check requests, and other forms authorizing the expenditure of University funds must be approved by the person responsible for the cost center account to which the expense will be charged. The purchasing authority requirements for varying levels of purchases are set forth below. Splitting orders to avoid dollar limits throughout these policies and procedures is prohibited.

Level of Authority	
Amount	Individual
All purchase requisitions, orders, check requests and other forms authorizing expenditures	Person responsible for the cost center and their responsible manager
Under \$500.00	Cost Center Manager
\$500.00 - \$49,999.00	Cost Center Vice President & Purchasing
\$ 50,000 - \$ 124,999	Purchasing & CFO
> \$125,000 (not included in the annual budget)	Finance Committee

B. Required Quotes, Bids, and Requests for Proposals

Competitive quotes, bids, and requests for proposals are required as follows except for single source vendor or emergency purchases (see Sections E. and F. below).

- Competitive quotes are not required for purchases under \$2,000.
- Verbal competitive quotes are required from three vendors for purchases between \$2,000 and \$4,999 unless the purchase is made from a vendor on the preferred vendor list maintained by the Purchasing Department and found on the University’s intranet.
- Written competitive bids from three vendors are required for dollar amounts of \$5,000 or more.

- Formal Request for Proposals are required for dollar amounts over \$25,000.
- In addition to the above Request for Proposals requirements, all purchases above \$125,000 that are not included in the annual budget must be approved by the Finance Committee.

Bid specifications should be forwarded to the Purchasing Department with suggested vendors and the date the items are needed. Specifications should be received in the Purchasing Department in advance to allow processing of the request prior to the date the order needs to be placed. The Purchasing Department will place all bids unless approval is given by the Purchasing Department for the department to solicit the bids. The Purchasing Department will coordinate the final decision for purchase with discussion and input from the end user. In some cases the low bid may not be the best bid. The reason for not accepting the low bid must be filed with the bid record.

Bids or quotes are not required in cases where the purchase is from a single source vendor (See subsection “E” below); amendment or modification of an existing contract; or where the same item has been previously bid within the last year.

C. Electronic Requisitions and Paperless Processing

All requisitions are submitted electronically through the Banner Finance System prior to procuring goods or services. Required backup should be scanned and attached electronically to the requisition as follows:

Tangible purchases (goods):

- *Office supplies* from the vendor (designated by the purchasing office for general use, such as Office Depot) does not require backup as long as the item number, description, and price is indicated on the detail lines of the requisition.
- *Under \$2,000* – specifications of goods to be purchased.
- *\$2,000 to \$4,999* – specifications and documentation of verbal competitive quotes obtained from vendors.
- *\$5,000 to \$24,999* – quotes with specifications are required to be written from the vendor. The sourcing should generally be performed and/or directed by the purchasing office.
- *\$25,000 +* – attach the specifications and considerations for the Request for Proposal (RFP) to be prepared by the purchasing office. If the specifications are voluminous, scan the first page of the specifications indicating the project name, date, and preparer’s contact information (architect, engineer, etc.) and forward the full set to the Purchasing Office.

Intangible purchases (services, construction services, rights, etc.) – All intangible purchases must be accompanied by a written document that identifies

what the University will receive in exchange for payment. The fully executed contract should be attached to the requisition at origination. The purchase order should be for the full amount for which the University is obligated per the contract terms. Requisitions and/or purchase orders should not be established for individual pay requests related to an underlying obligation. Rather, pay requests or monthly payments related to a contractual commitment are paid against a standing purchase order by forwarding the scanned approved invoice to invoices@oru.edu with the purchase order number indicated in the subject line of the email.

D. New Vendors, Vendor Changes, and Internet Purchases

Preference should be given to the list of preferred vendors maintained by the Purchasing Department which is available on ORU's intranet. Purchases under \$2,000 should be from vendors on the preferred vendor list.

Vendors not established on the Banner Finance System need to complete a vendor application. These forms may be found on the University intranet or obtained from the Accounting Department. The vendor may submit required documents and/or communicate with the Accounting Department through the email address vendors@oru.edu. Address changes should also be forwarded to this email address.

For internet purchases from a vendor that accepts credit cards, it is not necessary to establish the vendor on the Banner Finance system. Enter the requisition with a vendor name of "Purchasing Office Credit Card" to request the purchasing office to complete the purchase using their central credit card and include an electronic "print" of the internet purchase with sufficient information to allow the purchasing office to complete it.

E. Single Source Vendors

Where there is only a single source vendor (for such items as equipment, supplies, or services of a particular manufacturer, repair parts for special equipment, and equipment of a special character or design required for special instruction or research) competitive quotes or bids are not required. Any item over \$2,000 where there is only a single source vendor must be clearly justified. A written document must be attached to the purchase requisition when submitted to Purchasing with sufficient detail of the single source justification.

F. Emergency Purchases

There are times when a purchase is required and the time required to go through standard purchasing policies will create unacceptable hardship, damage to University facilities, or loss of employee time. Such emergency situations will require committing University funds without normal approvals. Examples are emergency repair of vital equipment, removal of ice or snow, a medical emergency, etc.

When such situations occur, if the amount is estimated to exceed \$2,000, the area Vice President's approval is required. For amounts less than \$2,000, the person making an emergency purchase must notify the cost center manager(s) for after-the-fact approval and thereafter submit all relevant information when entering the RQ on the Banner system, including a written justification for the emergency. Emergency purchases exceeding \$50,000 need to be approved by the President or CFO.

G. Purchase Requisitions and Purchase Orders

Electronic requisitions are automatically checked by the computer system for budget availability. Requesting departments shall specify what is needed in enough detail and clarity so that Purchasing and the vendor(s) have no question as to what is wanted. Purchasing will give assistance in writing specifications, if requested. Supplier contacts may be made by departments to help set the specifications or obtain the best pricing. However, department personnel should not negotiate with or make commitments to the vendor representative unless such authority has been delegated by the Purchasing Department.

The purchase order is the standard instrument used to procure goods and services. All University procurement transactions require a purchase order except in cases where an alternative method has been specifically identified and approved by the Purchasing Department. Each of these alternative methods will be discussed below. Purchase orders can only be created in the Purchasing Department following submission and approval of a purchase requisition as required in Section A. above.

Final prices, terms, and conditions of the purchase are the responsibility of the Purchasing Department. The Purchasing Department will communicate with the vendor to place orders unless such authority is delegated to the end user. Effectiveness in negotiating and buying is seriously hampered by commitments implied or preferences expressed to supplier representatives without order placing authority. Often these commitments lead to misunderstanding and poor relationships within the University community and with suppliers.

H. Blanket Purchase Orders

Blanket purchase orders are issued as monthly or yearly orders for specific departments when the specified services or items are from the same vendor for standard materials or supplies requiring numerous shipments for a specific time period.

The Purchasing Department will request quotes and bids on blanket purchase requisitions, unless Purchasing Department requests end user to supply quotes and bids for Purchasing Department's review, before a blanket purchase order is issued.

A blanket purchase order authorizes unspecified purchases from vendors not to exceed a stated amount. A requisition will be submitted to the Purchasing Department with the appropriate information and proper approvals. A purchase order will be returned to the department by Purchasing. The purchase order will be forwarded to the vendor by the Purchasing Department. Blanket requisitions must be issued for a stated period of time and a definite amount of money. No equipment or services can be procured on blanket purchase orders.

Receipt of materials under blanket purchase orders are usually for less than the total dollar amount authorized by the purchase order. An approved invoice and all delivery documents from the vendor under such purchase orders should include quantities and dollar amount so that the Accounts Payable Department has proof of delivery to match to invoices.

I. Contracts and Leases
(This policy excludes academic teaching contracts.)

For purposes of this policy, a contract is defined as an agreement between two (2) or more parties, one of which is the University, intended to have a legal effect. The parties must have a common understanding as to the essential terms; there must be mutual obligations; and there must also be consideration, or something of value exchanged.

In general obligations that should be committed to a written agreement include: goods and services; real estate; professional and consultant fees; affiliations (i.e. memoranda of understandings); amendments of existing contracts; agreement that exposes the University to potential liability; assumption of risk and releases; registration forms for events; agreements with terms twelve months or greater; and obligations exceeding \$5,000.

An employee wishing to enter into contract negotiations must have the cooperation and approval of any unit which may be implicated in performance of the contract. The employee initiating the contract shall be responsible for reading the contract entirely and determining that: (1) the contract is complete and the language accurately reflects the current state of negotiations; (2) the contract meets University mission requirements; (3) the contract is in the best interests of the University; (4) the department can ensure compliance with the contractual obligations placed on the University; and (5) the contract is sufficiently clear and consistent.

The University generally requires a third party to provide minimum general liability coverage of \$1 million per occurrence. Contracts with more inherent risks may require increased insurance coverage.

All proposed contracts \$25,000 or greater should be submitted to the University's General Counsel for review. Additionally, contracts with an unusually high risk factor, that bring the activities of the University under public scrutiny, or that

involve any controversial matter must be presented in advance for review by General Counsel.

All contracts and/or leases must be signed by the Executive Vice President and CFO or one specifically delegated to sign a specific contract and/or lease.

Any contract or lease for a total dollar amount of \$25,000 or more must be signed by the Executive Vice President and CFO.

Any contractual agreement with vendors, which includes terms or restrictions related to ORU's hiring of employees, must be provided to the Human Resources Department to make them aware of the contractual obligations

No action or performance shall be taken regarding a proposed contract until all parties have executed it including all appropriate legal entities.

J. Capital Equipment

A separate capital budget (equipment costing \$2,000 or more and having a useful life beyond one year) is established each year. Each capital equipment item request will be presented by the responsible vice president to the Executive Vice President and CFO for review and approval. All purchase requisitions for capital equipment must be signed by the Executive Vice President and CFO.

K. Construction and Renovation

All construction and renovation project requests are to be submitted to the Executive Vice President and COO. Except for projects requiring immediate attention (very rare), all regular project requests will be accumulated by the Executive Vice President and COO, reviewed with the Executive Vice President and CFO, and submitted annually to the Board of Trustees for final approval. The procedures section of these policies contains the processes required to facilitate these needs.

Construction and renovation projects for ORU will be approved based upon needs and priorities of the University and the availability of funds. Construction and renovation projects over \$2,000 are considered capital expenditures. Project requests are to be submitted annually during the budget process. Proper planning usually allows projects to be identified at least a year in advance. After the amount of the capital budget has been approved for the year, then the merits of each project will be debated. The priority of each project will be established, and it will be decided by the Finance Committee of the Board of Trustees which projects are approved along with other capital purchases for the year.

L. Information Technology

All information technology hardware and software acquisitions, retirements, and disposals, including telephone systems and equipment, must be approved by the

Information Technology Department. This includes all **technology goods and services**, regardless of whether or not a financial expenditure is associated. Shareware, freeware, demo products, and personally owned hardware/software that will be placed on ORU equipment or the ORU network, are to be considered an acquisition and are included in this policy. In this way the University can ensure that the networks of the school will not be adversely affected by incompatibility or capacity issues. Stand-alone hardware and software requests (academic and non-academic) must be submitted to the Information Technology Department for review before purchase approval. (See Procedures section below)

M. Printing and Graphics

All printing, binding, and photocopying requests must be requested through Pitney Bowes. All text and accuracy for printing is the responsibility of the requesting department. All brown line proofs must be approved in writing, with any changes, before final printing occurs. A standard delivery time and price lists are available for their services. Also, they will supply a quote on each specific job requisition to ensure that misunderstandings are minimized.

It is the responsibility of each department ordering printing services to plan their needs to avoid emergency printing.

N. Marketing

All print media used to promote the University or a University department/area must be coordinated and pre-approved through the Director of Marketing. This centralization and approval will ensure consistency in the University's branding and assist the University in cost containment.

O. Petty Cash

Certain departments will be assigned petty cash accounts to expedite purchases during off hours or when it is impractical to use other purchasing methods. Such purchases have the following restrictions:

- Purchases must be limited to \$50 or less
- Loans or advances to employees for personal use from the Petty Cash Funds are forbidden
- Personal checks cannot be cashed through the Petty Cash Funds
- Office and janitorial supplies otherwise available through the Purchasing process or Sodexo should not be purchased with Petty Cash Funds
- Reimbursement from Petty Cash Funds for travel expenses, travel advances, entertainment, printing costs and personal services are not permitted
- Plants, flowers, coffee, gift cards, food items such as snacks and business meals, gifts or party supplies are not allowed
- Office décor should not be purchased from the Petty Cash Fund

- Payments to independent contractors cannot be made from Petty Cash Fund

A custodian will be assigned to each Petty Cash Fund and will be personally responsible for ensuring that expenditures incurred are allowable in accordance with ORU Purchasing and Accounts Payable Policies. The custodian will be held responsible for any unallowable expenditures.

The Petty Cash Funds should be in a secured and locked location only accessible to the custodian.

Reimbursement should be requested to replenish the account when the approved balance reaches 50% or purchases exceed a 60 day time frame, with Form FM 226 (Request for Reimbursement of Petty Cash Fund), scanned and attached to a requisition entered on the Banner system. Detailed original approved receipts must be provided for replenishment. Independent periodic surprise audits of the funds will be performed.

P. Prepayments and Deposits

In cases where a supplier requires that a check accompany a purchase order, the originating department will coordinate arrangements with Purchasing. The requisitioner must clearly indicate on the requisition that a check is to be sent with the Purchase Order. The Purchasing Department will communicate with the vendor to ensure that all required information is obtained in advance of a check requisition. The Purchasing Department will submit a payment request to invoices@oru.edu with the approved purchase order in the subject line. The check will be mailed by Purchasing to the vendor with the purchase order. Requisitioners should request prepayment only when *absolutely* necessary.

Instances where it is necessary to make an initial deposit followed by subsequent payment of a balance require that the requisitioner clearly indicate on the requisition that two separate payments are required. The Purchasing Department will communicate with the vendor and follow the same procedure as when full prepayment orders are initiated.

Q. Change Orders

The Purchasing Department will issue a change order in cases where significant variances in specification, quantity, or cost to an existing purchase order require written clarification. In cases involving increased funding, any change in cost that represents an increase of ten percent (minimum \$250 purchase order) requires that a written request for change be mailed or emailed to the Purchasing Office by the requestor with appropriate approvals.

Regardless of the percentage, change orders are required in any instance where the total of the increase is \$1,250 or more. Approvals for change orders must go through the same approval process as the original request.

Correspondence with suppliers relating to present orders for the purpose of changing specifications, quantities, delivery requirements, or cancellations shall be directed to Purchasing personnel who then will communicate with the supplier. Purchasing will keep departments apprised of the status of each of their orders and changes.

R. Outside Grants

Outside grants often contain specific requirement for approval of purchases. Those requirements must be followed; there will be no exceptions without written approval from the granting agency. Where outside grant purchasing requirements are more lenient than ORU's requirements, ORU's requirements must be followed. All invoices covering grant money must be approved by the Sponsored Programs Department.

S. Conflict of Interest

Employees or immediate relatives of employees are not eligible to be suppliers of goods or services to ORU. Immediate family is defined in this policy as mother, step-mother, father, step-father, father-in-law, mother-in-law, spouse, son, daughter, step-son, step-daughter, brother, sister, sister-in-law, brother-in-law, grandparent, grandchild, including spouse's grandparent or grandchild.

T. Receiving and Returning Goods and Materials

All original packing slips received in the requesting department need to be sent to the Purchasing Department as soon as possible after verifying quantities and condition of the merchandise. Also, sign and date all packing slips. A purchase order #, iPurchasing PR# or paper requisition# must be referenced on all packing slips.

When merchandise needs to be returned to the vendor, the requesting department needs to obtain a Return Authorization Number from the vendor. An ORU Material Return Form (FM 437) needs to be filled out. Contact the Receiving Department when the material is packaged, taped and ready for shipping. The package should have the ORU Material Return Form and a Delivery Request Form with shipping instructions (vendor name, return address and Return Authorization Number) with the package. Please contact Purchasing with the Purchase Order # and information on the return.

To return office supplies, please contact the Purchasing Department to request the RMA# and to obtain instructions for the return.

When a vendor is responsible for shipping charges on a return, a Call Tag will be processed by the vendor. In these situations, the department arranges the material to be picked up by the Receiving Department to have available when the Call Tag is presented in Receiving. A Call Tag is only valid for three (3) days. If the

process is not completed during this time period, a new Call Tag must be initiated from the vendor.

III. Procedures

A. Vehicle Purchases

In order to accomplish the mission of Oral Roberts University, we are required to have a safe, modern and well-maintained fleet of vehicles. Additionally, University-owned vehicles, particularly those bearing the ORU logo, must present the professional image of the University.

Prior to the beginning of each fiscal year, the Director of Public Safety and Security (cost center manager for ORU Motor Pool) will obtain updated vehicle histories on the current ORU fleet. This information will be used to determine which vehicles will be considered for replacement.

The Director of Public Safety and Security, Vice President and COO, and the Vice President and CFO will meet and review the vehicle inventory. Following the review, the Vice President and CFO will make recommendations along with other capital items for approval and construction of the capital budget for the year. Capital items requiring Finance Committee's approval for purchase (such as automobiles) will be presented to them for final approval before purchase.

Standards for vehicle replacement: Focus on six criteria is used to identify vehicles to be replaced. These include:

1. Safety – Is a vehicle no longer safe to operate and repair impractical or unrealistic?
2. High vehicle mileage, maintenance history and presentation.
3. Severe collision damage/insurance totaled
4. Off-campus duties and responsibilities
5. Budget limitations
6. Employee contract guidelines

Additionally, input is requested from the Motor Pool Manager and the departments that use the specific vehicles. In some cases, multiple vehicles in one area may be subject to replacement and it becomes necessary to prioritize.

New vehicle purchases are based on low bid and history with various auto dealerships. Several local dealerships have displayed support for the University's mission and have provided excellent service and favorable pricing.

Pre-owned vehicles come from a variety of dealerships throughout the region. These purchases are based on the specific type of vehicle required, condition, and pricing.

Pricing Resources include Kelly Blue Book and/or Consumer Reports Automobile Ratings and Pricing Guides.

B. Construction and Renovation

These procedures provide direction to all those involved in new construction and renovation projects from original requestor to final acceptance of a completed project.

1. Approval Levels

Projects with dollar amounts less than \$2,000 will be approved by the cost center manager where the expense will be recorded and approved by the cost center manager's supervisor and will require the specified approvals stated previously in the policy contingent upon the dollar amount of the purchase. The request is made through the Banner Finance system as described in Section "C", above.

Any project of \$125,000 or more must be approved by the Finance Committee for final approval.

2. Project Requests Documentation

A written proposal is prepared by the requestor which described the proposed new construction or renovation project, identifies the physical space and provides a program description of the proposed usage of the space. This proposal should identify the proposed funding means for the project (if known by the requestor), the time frame for completion of the project and any impact on current occupants of the space, as well as those in surrounding areas.

A clear statement of justification for the project must be included with the initial request. This proposal should be submitted to the Executive Vice President and COO.

3. Initial Design and Budget

The Building and Grounds Department will work with the requestor to develop a preliminary design, and Buildings and Grounds will prepare a budget estimate for the proposed project.

4. Approval to Proceed to Detail Planning

The preliminary design and budget then is submitted to the Executive Vice President and CFO for review. If the project cost is \$125,000 or greater, the Executive Vice President and CFO will consult with the Board of Trustees Finance Committee and determine whether to stop or proceed with incurring professional costs for detailed planning and budgeting.

5. Detailed Construction Planning and Budgeting

- a. Architectural, engineering and other services should be employed in conjunction with Facilities staff as a design team to develop detailed construction plans.
- Facilities staff to coordinate communications between requestor and the design team.
 - Team should review compliance with all applicable building code or other requirements.
 - Team should identify which Building Permits are applicable to this project.
- b. Project should be designed in accordance with established ORU Architectural Standards and Guidelines, as approved by the President and Finance Committee.
- c. Cost estimates should be developed based on the detailed construction plans developed at this stage.

6. Final Approval to Proceed with Construction

Final design and project budget should be submitted to the Executive Vice President and CFO for review and approval, and submission to the Board of Trustees if the project is \$125,000 or over.

7. Bidding Procedure

Operations staff will conduct the bidding process. For projects of \$5,000 up to \$25,000, written bids are to be obtained from a minimum of three (3) qualified bidders. For projects over \$25,000, a Request for Proposal is required to be sent to a minimum of five (5) qualified contractors.

8. Materials Procurement

An Approved Vendor list should be maintained by the Operations Department, identifying vendors with whom ORU has established accounts and relationships. Bids for materials should be secured from at least three sources, and purchase should be made from the low bidder. If the low bid is not selected, refer to Section II., B., Page 3. Materials should meet or exceed the requirements of the project design and/or ORU Construction Standards and Guidelines.

9. Scheduling Procedure

Construction of projects will be scheduled depending upon available funds, minimal impact on academic, administrative and student life activities, and efficient use of on-campus labor resources.

C. Information Technology

Being good stewards of the resources provided is an important part of maintaining fiscal responsibility and continuing campus technology advancements. It is for this reason that the following procedures exist.

Technology Goods and Services Defined:

Technology goods and services include, but are not limited to, the following:

- Software, of any kind
- Software upgrades or maintenance
- Hosted solutions (A hosted solution is a technology product, typically software, that does not reside on the ORU network, but is used to support the business activities of the subscribers. Examples: WebEx, third party e-mail and calendar services, and typically any vendor that requests IP addresses or access to our network.)
- Off-site digital storage providers
- Data analysis or conversion services
- Document imaging services
- Data list purchases
- Database subscriptions
- Computers
- Monitors
- Computer memory or hard drives
- Printers
- Copiers
- Fax machines
- Scanners
- Bar code readers and scanners
- Smart boards
- Televisions
- Blue Ray, DVD, or VCR players
- Network equipment, hubs, switches, etc.
- Phones
- Mice, keyboards, and tablets (wired or wireless)
- Webcams
- Camcorders
- Cameras
- Projectors
- Digital recorders
- External digital storage
- PDA's

- iPads
- Any equipment that transmits a wireless network signal (excludes cell phones with wireless capabilities)
- Power supplies or UPS devices to be used with technology equipment
- Any equipment that will attach to ORU-owned computers or servers and requires software installation to enable use of that equipment
- Technology related support and/or maintenance services or contracts
- Supplies necessary to repair or maintain technology equipment

This policy applies to all faculty and staff.

Steps for Acquisition of Technology Goods or Services

1. Contact the Information Technology Department as soon as a need is determined and, if applicable, before a vendor(s) is engaged.
2. If vendor involvement is necessary, work with the Information Technology Department to determine the best way to engage vendor(s). I.T. must remain involved in the vendor discussions at the level in which the designated I.T. staff member deems appropriate. In many cases the I.T. Department will facilitate the quotation or statement of work process to insure the best possible solution and/or pricing is achieved.
3. Any technology equipment with a useful life of more than one year and a cost of \$2,000 or more will be recorded as a capitalized item and depreciated in the University General Ledger. (See Policy on Capital Equipment, Item J)
4. Present any technology related contract or documentation requiring an ORU signature, to the CIO for review and approval. The CIO, or designee, will facilitate the contract or document review and signature of the Executive Vice President and CFO. This must be completed prior to making any verbal or written commitments to vendor.
5. For acquisitions not requiring a financial expenditure, the requestor must receive written approval from the I.T. Department prior to initiating the acquisition. At that time the I.T. Department will communicate what level of support will be provided for the requested item, if applicable. In many cases, this will be communicated earlier in the process.
6. For acquisitions requiring a financial expenditure, the requestor must have the associated requisition originate in the I.T. Department. At that time the I.T. Department will communicate what level of support will be provided for the requested item, if applicable. In many cases, this will be communicated earlier in the process. Note: Technology acquisitions using grant funds, will involve the appropriate Grant Officer.
7. For acquisitions associated with recurring fees, it is the responsibility of the requestor to insure that the I.T. Department is aware of those fees. In most cases this is included in the quote process, and I.T. will be aware.
8. For acquisitions obtained prior to the establishment of this policy, which have associated recurring fees, it is the responsibility of the “owner” to notify the I.T. Department of those fees and their frequency. Doing so

will allow the I.T. Department to recommend more effective or cost saving alternatives, should they exist.

9. Items requiring installation or configuration must have I.T. Department involvement at the level determined by the designated I.T. staff member. If this task was not identified at the time of acquisition, it is the responsibility of the requestor to notify the I.T. Department prior to installation or configuration.
10. Acquisitions classified as trackable assets will be catalogued and/or receive asset tags prior to delivery to the requestor. Warranty information will also be associated with that asset, where applicable.
11. Requestor must notify the I.T. Department if any acquisition is deemed defective or does not satisfy the features and/or services defined in the associated requisition. (i.e. Quote, License Agreement, or Statement of Work).
12. When a University “owned” technology good or service, as identified under Section III.C, is no longer functioning properly or is determined unneeded, the individual using that good or service must contact the I.T. Department. The I.T. Department will then communicate the appropriate steps for repair, replacement, retirement, or disposal. Note: Due to asset accounting procedures and environmental regulations, it is particularly important that I.T. be notified in this instance.