



Standard Operating Procedure (SOP)			
General Procurement Requirements and Limits			
SOP No.	DC-2100	Revision :	02
Department:	Design and Construction	Date:	11/16/16
Dept. Head Approval:		Date:	11/17/16
Director Approval:		Date:	11/21/16

Purpose/Scope:

The purpose of the procedure is to describe the general procurement guidelines and purchasing limits for purchase of materials, equipment, professional services, and construction services.

Responsibility:

1. The following people are responsible for following this SOP.
 - 1.A. All employees responsible for supporting the processing of contracting services
 - 1.A.1. Project Managers
 - 1.A.2. Project Engineers
 - 1.A.3. Category Managers

Definitions:

1. Construction Services (CS): any construction, reconstruction, improvement, alteration, repair, enlargement, painting, or decorating of any building, road, bridge other structure or property owned by or located on property controlled by West Virginia University.
2. Goods: materials, supplies, and equipment purchases that do not involve labor and services (professional or other)
3. Mountaineer Marketplace (MM): WVU’s eProcurement tool, used to order supplies from various vendors.
4. Open End and Indefinite Delivery/Indefinite Quantity (IDIQ) Contracts: Contracts established by PCPS with various vendors. Goods and services may be purchased against these contracts at any time regardless of price. This excludes construction

and major renovations.

5. Procurement, Contracting Payment Services (PCPS): buying, purchasing, renting, leasing, or otherwise acquiring any materials, equipment, services, or construction. It also includes all functions that pertain to the obtaining of said goods, including description of requirements, selection, and solicitation of sources, and administration.
6. Purchase Order (PO): a commercial document issued by a buyer to a seller, indicating types, quantities, and agreed prices for products or services the seller will provide to the buyer.
7. Request For Bid (RFB): Formal process where bids are solicited from various vendors where basis of selection and award is the lowest responsive, responsible bidder.
8. Request For Proposal (RFP): Formal process where proposals are solicited from various vendors where the basis of selection includes factors other than or in addition to cost. Selection criteria must be determined in advance.
9. Services (Professional and non-professional): Any individual or company providing some type of service (maintenance, repair, consulting, etc.) to the University.
10. Visa Procard (P-Card): WVU issued credit card to qualified and approved employees.

Procedure:

1. GENERAL

- 1.A. The appropriate purchase orders or contracts must be issued prior to starting work or working services.
- 1.B. The general purchasing requirements/limits for public agencies in the state of West Virginia are listed below:
 - 1.B.1. All purchases for goods and services over \$50,000 must be done through a public solicitation (RFB or RFP). Goods and services may be considered Sole Source if there is only one choice for delivery of the desired good or service. Sole Source purchase must be documented and signed off by the Associate Director of Procurement or the Vice President of PCPS.
 - 1.B.2. All purchases of construction services over \$100,000 must be done through a public bidding process (RFB)
- 1.C. All capital improvement projects over \$25,000 require approval from the WVU

University Planning Committee (UPC)

- 1.D. Projects in excess of \$1,000,000 require prior approval from the WVU Board of Governors (BOG) prior to awarding of contract/purchase order.

2. VISA PROCARD (P-CARD)

- 2.A. A P-Card may be used for Materials, and Supplies in emergency situations, to small, local vendors/retailers (ie, Walmart, Ace Hardware), one time purchases where vendor registration does not make sense. P-Card purchases shall be limited to \$5,000. Professional and Construction services are not permitted to be charged to a P-Card. The original P-Card receipt signed by the P-Card owner and TMA Project Requisition are the required documentations to be submitted to the EBO. It is the responsibility of the individual to check with the vendor for verification of P-Card acceptance. A purchase order must be issued if a vendor does not accept P-Card.

3. PURCHASE ORDERS FOR GOODS AND PROFESSIONAL SERVICES LESS THAN \$50,000

- 3.A. Purchases less than \$50,000 do not require public bidding, but three (3) quotes are highly encouraged whenever possible. WVU accepts scanned/faxed quotes. Quotes should be on a company letter head and signed ~~but~~ however, signatures are not required. Note: A PO issued in this manner may not exceed the \$50,000 threshold including all change orders. Purchases under \$50,000 require the following documents:

- Evidence that the Vendor is registered with the State
- Proof of Insurance meeting state of WV requirements
- Purchasing Affidavit form
- State of West Virginia Construction Purchase Order terms and conditions

4. PURCHASE ORDERS FOR GOODS AND SERVICES GREATER THAN \$50,000

- 4.A.1. Purchases above the \$50,000 threshold shall be competitively solicited using a public RFB or RFP process. These purchases must be advertised through WVU PCPS in compliance with West Virginia Code 5G-1 and West Virginia Board of Trustees Title 128, Policy Bulletin 54. Goods and services may be considered Sole Source if there is only one choice for delivery of the desired good or service. Sole Source purchase must be documented and signed off by the Associate Director of Procurement or the Vice President of PCPS.

5. PURCHASE ORDERS FOR CONSTRUCTION LESS THAN \$100,000

5.A.1. Purchases less than \$100,000 do not require public bidding but do require three (3) quotes whenever possible. WVU accepts scanned/faxed bids and should be on a company letter head and signed but signature is not required. A PO issued in this manner may not exceed the \$100,000 threshold including all change orders. Purchases under \$100,000 require the following documents:

- Contractor Licenses for the State of West Virginia and for the City of Morgantown (if in city limits)
- Proof of Workers Compensation
- Evidence that the Vendor is registered with the state
- Proof of Insurance meeting state of WV requirements
- Purchasing Affidavit form
- WV State Contractor License
- State of West Virginia Construction Purchase Order terms and conditions

6. PURCHASE ORDERS FOR CONSTRUCTION GREATER THAN \$100,000

6.A.1. Purchases above the \$100,000 threshold must be competitively bid using the RFB process. These purchases must be advertised through WVU PC&PS in compliance with West Virginia Code 5G-1 and West Virginia Board of Trustees Title 128, Policy Bulletin 54. This can be either open end bid or public bid.

6.A.2. All construction contracts exceeding \$100,000 require the following documents from the vendor prior to awarding a purchase order:

- Contractor Licenses for the State of West Virginia and for the City of Morgantown (if in city limits)
- Proof of Workers Compensation
- Evidence that the Vendor is registered with the state
- Certificate that the vendor is in compliance with the West Virginia Drug-Free Workplace Act
- Proof of Insurance meeting state of WV requirements
- Purchasing Affidavit
- Bid Bond greater than \$100,000
- Performance Bond, Labor and Material Payment Bond greater than \$100,000
- Maintenance Bond (if roof work is being performed) greater than \$100,000

6.A.3. Contract Documents:

- AIA A101 and A201 contract with appropriate WV Supplementary Conditions if over \$500,000 or is a complex project
- AIA A107-2007 contract with appropriate WV Supplementary Conditions if between \$100,000 and \$500,000 or is not a complex project

7. PUBLIC ADVERTISEMENT (RFB, RFP)

7.A. Public Solicitation Advertisements are issued through PCPS.

7.B. Formal Bids, RFPs, and Architectural Services are posted at the WVU Procurement Website <http://wvubids.finance.wvu.edu>, Request can be made to PCPS for additional advertisements for newspapers.

8. STANDARD CONSTRUCTION CONTRACTS

8.A. WVU has standard contracts that must be used for Architectural and Engineering Design Services and Construction Services.

8.B. Anything outside of WVU's standard terms and conditions with WVU supplemental conditions must be approved by the State Attorney General's office.

9. OPEN END/ARCHITECT/ENGINEER CONTRACTS

9.A. This Open End contract mechanism is utilized for firms that have already been selected through a competitive solicitation.

9.B. The contract is open to AE Services that include the following categories:

- 9.B.1. Architectural Services
- 9.B.2. Engineering Services
- 9.B.3. Hazardous Materials
- 9.B.4. Commissioning

9.C. Refer to approved contract for specific requirements.

9.D. This mechanism can be used for contract fees up to \$250,000 (including Change Orders).

9.E. Proposals should be solicited from a firm on the approved Open-End List. Selection can be based on qualifications, cost, or combination thereof.

10. OTHER CONTRACT MECHANISMS

- 10.A. Other acceptable contract mechanisms include State Contracts and other established contracts. Consult PCPS for specifics.