BEFORE YOU BUY

UVI Procurement Quick Guide for Staff

PLAN

BUY

COMPLY

STOP: A requisition is NOT a purchase order.

Do not authorize a vendor to begin work, ship goods, or provide services until an approved Purchase Order (PO) or other authorized purchasing method is in place.

1 | THE PURCHASE PATH

DEFINE THE NEED	CONFIRM FUNDING	GET REQUIRED QUOTES / DOCS	SUBMIT REQUISITION	OBTAIN APPROVALS	PO ISSUED VENDOR PROCEEDS

2 | KNOW YOUR THRESHOLD

GOODS & SERVICES		CONSTRUCTION & REPAIRS	
$0 - $9,999.99	Small Purchase	**$0 - $9,999.99**	Small Purchase
$10,000-$25,000	Informal Procurement	**$10,000-$50,000**	Informal Procurement
Over $25,000	Formal Competitive Procurement	**Over $50,000**	Formal Competitive Procurement

Purchases over $1,000,000 require Board approval. | Never split purchases to avoid a threshold or approval.

3 | BEFORE YOU HIT SUBMIT

✓ Clear description of goods/services	✓ Correct funding/account information
✓ Complete scope/specifications (when applicable)	✓ Supporting documentation
✓ Required quote(s) or proposal(s)	✓ IT review for technology purchases
✓ Correct vendor information	✓ Justification for any exception to competition

WHO WRITES THE SCOPE?

The requesting department develops its Scope of Work and technical specifications. Purchasing assists with the procurement process, but the department is the subject-matter expert for its needs.

KEEP IT MOVING - AVOID PROCUREMENT DELAYS

Know the routing, competition rules, P-Card basics, and common red flags.

4 | REQUISITION APPROVAL FLOW

Requestor	Department Head	Accounting / Fund Authority	Purchasing	Additional Approvals*	Purchase Order Issued

*Additional approvals may include the appropriate Vice President, President, or Board.

5 | COMPETITION & EXCEPTIONS

FAIR COMPETITION

- Do not promise work in advance.
- Do not tailor specs to favor a vendor.
- Give vendors the same information/opportunity.
- Purchasing coordinates formal solicitations.

SOLE SOURCE

- A preferred vendor is not automatically a sole source.
- Show why only one source can reasonably meet the requirement.
- Full justification and approval are required.

EMERGENCY

- Poor planning or a missed deadline does not automatically create an emergency.
- Emergency requests require appropriate justification and approval.

6 | P-CARD AT A GLANCE

SINGLE TRANSACTION	STANDARD MONTHLY LIMIT	NON-NEGOTIABLE
$2,499.99	$3,000	Never split transactions

Use P-Cards only for allowable University business expenses; retain receipts/supporting documentation and complete all reconciliation requirements. Certain authorized cardholders may have different approved limits.

7 | TOP PROCUREMENT RED FLAGS

✗ Vendor starts before PO is issued	✗ Expect Purchasing to write technical requirements
✗ Purchase first, approval later	✗ Last-minute request for a time-sensitive purchase
✗ Split purchases to avoid requirements	✗ Assume an existing vendor automatically gets more work
✗ Vague or incomplete scope/specifications	✗ Use sole source/emergency as a substitute for planning

PLAN EARLY = FEWER DELAYS

Formal solicitations, contracts, construction procurements, complex scopes, federally funded purchases, and purchases requiring executive or Board approval need additional lead time for competition, questions, evaluations, approvals, contracting, and PO issuance.

NOT SURE? ASK BEFORE YOU BUY. purchasing@uvi.edu

FY27 | UPDATED FINANCIAL POLICIES — STAFF REFERENCE

Effective 2026 Financial Policies • Follow stricter federal, grant, or funding-source rules when applicable.

8 | QUOTATIONS, PROFESSIONAL SERVICES & APPROVALS

Goods / non-professional services: $10,000–$25,000 requires at least 2 written quotations unless limited competition is documented; above $25,000 requires a formal IFB/RFP.

Professional / consulting services: Written proposals are encouraged up to $25,000; above $25,000 requires at least 2 competitive written proposals.

Construction, repairs & renovations: Informal bids permitted up to $50,000; formal bids required above $50,000.

Approval authority: Department/Budget Unit Heads up to $10,000; Deans, VPs and Component Heads up to $50,000; VP Administration & Finance up to $100,000; President up to $1 million; Board above $1 million. Authority applies to aggregate procurement value, including changes and renewals.

9 | EXPANDED COMPETITIVE PROCUREMENT EXEMPTIONS

Specified exemptions now include specialized professional services, certain technology/SaaS and cybersecurity purchases, academic/research needs, authorized dealer/OEM services, licensing and accreditation fees, conference-related expenses, and certain travel/lodging and intergovernmental purchases.

An exemption is not automatic approval: consult Purchasing for the applicable justification, price-reasonableness review, approvals and grant restrictions.

10 | SURPLUS PROPERTY — DO NOT DISCARD WITHOUT APPROVAL

Submit a Surplus Property Declaration Form to Purchasing (asset tag, serial number, condition, funding source, estimated value and data-removal certification for IT equipment). Purchasing determines eligibility; written authorization is required before transfer, donation, sale, recycling or disposal.

Usable items must first be offered for internal redistribution under University guidelines. High-value, sensitive and federally funded assets have additional reviews and approvals. No direct gifting or sale to employees.

11 | P-CARD RECONCILIATION & ACCOUNTABILITY

Monthly reconciliation due by the 20th of the following month, with receipts and required documentation. Standard limits remain $3,000 monthly and $2,499 single transaction, unless individually approved otherwise.

Late submission consequences during FY27: 1st = written warning; 2nd = suspension for the following month; 3rd = revocation. Late submissions are counted cumulatively across FY27.

Split purchase example: A $3,000 computer cannot be charged as two $1,500 P-Card transactions or divided across cards to avoid the single-transaction limit.

Questions? purchasing@uvi.edu, 340-693-1482 or 340-692-4170 | Reference: UVI Financial Policies (2026), Sections 1.8, 1.13–1.14, 2 and 3.