

July 2, 2013

**SUBJECT: Changes in Procurement Procedures**

The following is a list of approved changes to current procurement procedures, effective as of July 2, 2013:

a. The following is a list of the authorized use of the Direct Charge Form:

- Utilities, phone, Internet, cable, and WATS,
- Bookstore resale products,
- Emergency expenses as defined in the UL Policy,
- Legal charges, temporary labor,
- Sports competition agreements,
- Subscriptions, memberships, dues, registrations, applications, exam fees, honorarium, enrollments, licenses,
- Reimbursement of pre-approved special meals and new-hire candidate meals and travel expenses.
- Athlete meal per diem and special meals.
- Payment to local vendors who have accepted Cajun Cash from students Cajun Card account,
- Requests for payment submitted by a Dean or Vice President and approved by the VP, Administration & Finance,
- SGA Appropriations,
- Workorder Repairs (Facilities Management, Laundry, Student Union, Housing),
- Other requests to use the direct charge form must be approved by a Dean/Dept. Head and by the VP, Administration & Finance.

b. The following is a list of prohibited use of the Direct Charge Form:

- Products and services not listed above,
- IT products,
- Travel related meals, food, hotels, flights, car rentals (Use Travel Card),
- Office supplies (Submit PR for a Bookstore buy),
- Research supplies, gifts of any kind,
- Food and snacks for workshops (Request approval with PR),
- Books, bus trips, reservation for booths,
- Auto and small appliance or equipment repairs (Use P-Card or submit a PR),

## From the Desk of the Director of Purchasing



- Non-emergency purchases,
  - Reimbursements other than bona fide emergencies,
  - Other reimbursements not authorized by VP, Administration & Finance prior to the buy.
- c. The Manual for the Use of the LaCarte Card has been rewritten and provisions tested in the field. Changes include:
- Charges for services are now permitted (repairs, gas bottles, etc.);
  - Credit limits can be increased on a case by case basis with the submission of a letter of justification along the lines of meeting operational requirements;
  - Certain food buys can now be put on the card with approval by the State;
  - Gift cards cannot be purchased with the LaCarte card.
  - Charges for the registration of webinars and on-line courses are permitted to be charged to the LaCarte card. Charging a course registration is permitted if the course does not require any type of travel. If the cardholder must leave their building to attend a course on the UL Lafayette campus, the charge is considered travel and cannot be charged on the LaCarte card.
- d. If the LaCarte card is not used for the purchase of goods or services, the only other option for such purchases is through the submission of a Purchase Requisition (PR) with an attached quote. The PR assures:
- All buys for goods and services are appropriately approved;
  - Funding is properly approved and allocated;
  - The volume of spend is captured by commodity through the use of commodity codes;
  - Purchasing is involved in the buy to obtain the best value;
  - Approving authorities are accountable for their department spend;
  - The University spend is controlled and proper procurement procedures were used.
- e. Contract Management
- All requests for a contractual agreement must be routed through Purchasing. Purchasing will solicit bids if required and generate the contract after negotiating with the Contractor.
  - Departments should not negotiate contract pricing with Suppliers; that is a Purchasing responsibility.
  - Unless delegated the authority, Faculty and Staff do not have the signature authority to sign any agreement that binds the University to any financial obligation to include, but not limited to, maintenance agreements, rentals and leases, labor agreements, software licenses, and other agreements for similar purchases.



f. Additional changes to the Procurement process include, but are still in progress:

- A change in the procurement process flow for Facilities Management. A clause will be added to the current Work Order (WO) form which will refer the Contractor to contract language located on the Purchasing website. The Contractor's invoice and the WO will be submitted to AP for payment. This process change will go into effect at a later date.
- Barton Broussard will be delegated with procurement authority as a Purchasing Manager.
- A change in the procurement process flow for NIRC. Purchasing and Finance are working on a re-engineered procurement process in which a Letter of Authorization (LOA) will be issued to Contractor. This LOA will refer the Contractor to contract language located on the Purchasing website. This process change will go into effect at a later date.
- Roxanne Jones-Jenkins will be delegated with procurement authority as a Purchasing Manager.

This document supersedes all other UL Lafayette procurement policies. These procedures are expected to be strictly followed effective July 2, 2013. Failure to adhere to these procedures may result in disciplinary action by the Administration. Disciplinary action may range from a verbal or written reprimand up to possible termination of employment. If an unauthorized procurement has occurred, the responsible individual may possibly be held personally liable for the payment of the expense.

If you have any questions, concerns or recommendations pertaining to the process changes in this document, please contact Purchasing via email, [jnf4727@louisiana.edu](mailto:jnf4727@louisiana.edu) or phone 2-5396.

A handwritten signature in black ink that reads "Joe Floyd".

Joe Floyd, PMP, C.P.M., CSSGB, CPPO  
Director of Purchasing  
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