To: Arts & Sciences Faculty, Administrators and Classified Staff

From: Interim Dean Joe Shields and CFAO April Ritchie

Date: January 29, 2019

This memo describes new guidance for purchasing that the College of Arts & Sciences is adopting in response to mandates from the State of Ohio and the University Affordability & Efficiency (A&E) Exception Process. This guidance amends our memo of June 14, 2018.

**College Guidance.** As previously indicated, the state has mandated that universities concentrate their purchasing to vendors identified as preferred suppliers in order to reduce procurement costs. The College strongly supports University and State efforts to enhance affordability and efficiency in higher education and is adopting this purchasing guidance to ensure that the transition is made without disruption to research and creative activity.

It is expected that the vast majority of purchasing activity will continue to move through the preferred providers in the Bobcat Buy system, particularly in the areas of office and educational supplies. Generally, A&E Exceptions will be approved for the following reasons:

- Material price difference – greater than $1,000 for a single supplier on a single requisition (this exception was previously in place for a significant price difference – greater than $1,000 on a single item)
- Compatibility with existing equipment
- Emergency
- Sole source
- Unique expertise or situation

**College Addendum to the Exceptions.**

Supporting faculty research and student engagement is a top priority of the College of Arts & Sciences and the University. When the pursuit of research and/or student engagement would be adversely affected in a significant way by increased costs, the college guidance now allows for exceptions to the material price difference criterion (referenced above).

The college exceptions process now moves the decision-making authority to grant exceptions to the department (either the chair, the director or the business manager in the department).

**College A&E Reporting Instructions.** In order to allow easy data collection on the approved A&E Exceptions in the college, the following table of prefixes was developed and is required as part of the Bobcat Buy and Concur process:

**Exceptions Prefixes to Use:**

<table>
<thead>
<tr>
<th>PREFIX</th>
<th>FULL NAME</th>
</tr>
</thead>
<tbody>
<tr>
<td>EX/COST</td>
<td>COST SAVINGS/MATERIAL PRICE DIFFERENCE</td>
</tr>
<tr>
<td>EX/COMP</td>
<td>COMPATIBILITY WITH EXISTING EQUIPMENT</td>
</tr>
<tr>
<td>EX/EMER</td>
<td>EMERGENCY PURCHASE</td>
</tr>
</tbody>
</table>
In Bobcat Buy,

1. For the shopping cart/requisition name, add the exception prefix to the name. See above for prefix list.
2. Complete the cart/requisition name as you normally would:
   Example: EX/COMP: drawer handles for Smith cabinet
3. Complete cart/requisition as you normally would, including completing the A&E Exception section.
4. You do not have to attach a completed exception form.

In Concur,

1. On the Concur report header, in the Business Purpose box, begin with the exception prefix. See above for the prefix list.
2. Complete the Business Purpose box as you normally would:
   Example: EX/COST: storage cabinet for Smith
3. Complete the Concur report as you normally would.
4. Attach the approved college exception form (see attached) and any additional documentation such as quote that prove the price difference (or other justification) to the Concur report along with all other required receipts and documentation.

If you have questions, please contact Claire Kimok for assistance (kimokc@ohio.edu).

Thank you in advance for your assistance in complying with the Ohio Governor’s Affordability and Efficiency mandate.