The Formal Vender Purchasing Requirements for Ohio University Employees:

“The Ohio Task Force on Affordability and Efficiency in Higher Education, with the Board of Trustees ratification, requires Ohio University to leverage spend campus-wide through contracted suppliers and leverage spend state-wide for areas of common spend through the Inter-University Council Purchasing Group (IUC-PG).

To assist with compliance, the Preferred Supplier list has been updated and an Exception form and process has been created for the very rare occasions that existing contracts will not suffice. It is highly recommended that the planning unit use the Exception Form to document the need and reasons for the approved exception. Audits will be performed and CFAOs must justify any exceptions granted.”

Please see the Purchasing website, under Affordability and Efficiency to get a list of the Preferred Suppliers and a copy of the Exception Form.

The Patton College of Education Affordability and Efficiency in Higher Education Exemption guidelines

The quoted paragraphs, above, reflect the mandates regarding purchases using Ohio University funds. This includes general operating funds, grant funds and foundation funds. This includes purchases made through Bobcat Buy and with an OU credit card.

Keeping this in mind, the guidelines for exceptions may not supersede other university policies and/or procedures, and all purchases are subject to final finance approval. However, in general, the CFAO for The Patton College of Education will consider exemption requests if one or more of the following apply:

- As we are preparing undergraduate and graduate students to do research and to excel in their scholarship, there may be certain software packages and/or specific equipment that students must use to be trained effectively or to complete projects for dissertations. Such items may be viewed as reasonable reasons for exemptions. On the exemption form, please include information that verifies this claim. If the information provided were compelling, the exemption would be granted. This request needs to be tied directly to a course and/or co-curricular activity within the college, including the approximate number of students this purchase would serve.

- If there is a current grant that was already active and budgeted before the mandate began (May 2017) and there is not an ability to re-budget, cost differentials of less than $1000 may be considered until the next
funding cycle begins. (This generally would be one year from the date of the new task number.) Please attach a short description to the exemption form explaining “due to budgeting constraints, this grant cannot comply until the next task is awarded”.

- The form lists items for consideration such as emergency, equipment compatibility, cost savings of $1000 or more, etc. These items will also be used to determine exemptions. If an emergency situation is cited, please explain how this may be avoided in the future, if possible.

12/07/18 bl