



Division of Finance and Administration
Delegations of Authority
Effective January 1, 2019

Note: This memorandum replaces and supersedes all previous communications on the subject of delegations of authority within the Division of Finance and Administration.

The Senior Leadership Team of the Division of Finance and Administration is comprised of those Associate/Assistant Vice Presidents and Directors who report directly to the Vice President and are designated as members of the divisional senior leadership.

Authority for the following personnel and financial actions is hereby delegated to each member of the Senior Leadership Team:

Personnel Actions

All Personnel Action Sheets are to be forwarded to the Division Budget Director for review.

Personnel Action Sheets below the “Director” level are the responsibility of the appropriate Senior Leadership member. However, all personnel actions related to compensation changes, suspensions, terminations, reprimands, and such, must be reviewed with Human Resources and the Vice President prior to action being taken. Also, until further notice, all compensation changes must be approved by the Vice President including cell phone allowances, position reclassifications, temporary increases for project work, etc.

Position Descriptions/Job Questionnaires below the “Director” level are the responsibility of the appropriate Senior Leadership member.

Performance Evaluations below the “Director” level are the responsibility of the appropriate Senior Leadership member.

Requests to Fill Position Vacancies should be discussed with the Vice President and reviewed by the Division Budget Director prior to submitting through the online system directly to the Vice President.

All Division of Finance and Administration departments are to follow the Employment Checklist guidelines as set forth by Human Resources on their website:

<http://uwf.edu/ohr/internal/forms/formsbySection/Employment/Recruitment/Recruitment%20Checklist.pdf>.

Financial Actions

The Division Budget Director will review and approve appropriate budget transfers for the Division.

Contracts valued at less than or equal to \$250,000 will continue to be executed by the University's Director of Procurement & Contracts. All others (>\$250,000) will be reviewed by the Director of Procurement & Contracts and forwarded to the Vice President. Procurement personnel: Assistant Director, Senior Buyers and Procurement Agents have been delegated authority to make purchases as outlined in the **Procurement and Contracts Signature Authority Matrix** (see attached document). Any contract \geq \$500,000 must be approved by the University President in accordance with UWF Policy P-04.05-05/18 "Authority to Sign Contracts and Documents."

Overtime Requests should be approved by the Vice President.

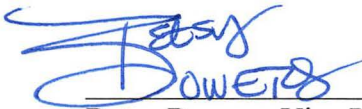
Purchase Requisitions are the responsibility of the appropriate Senior Leadership member. Requests in excess of \$10,000 must be reviewed and approved by the Associate Vice President for Finance/Controller. Any requisitions valued at \$100,000 or above must also be approved by the Vice President.

Survey of Property forms is the responsibility of the appropriate Senior Leadership member.

Travel forms (TARs/TERs) below the Director level are the responsibility of the appropriate Senior Leadership member.

Travel forms (TARs/TERs) Director level and above are to be reviewed by the Division Budget Director prior to the Vice President's approval.

Copies of all fully executed TAR/TER forms only (no supporting documents needed), including vicinity travel, are to be forwarded to the Vice President's Office for retention.



Betsy Bowers, Vice President
Division of Finance and Administration

Attachment

cc: Human Resources
Procurement

Procurement and Contracts Signature Authority Matrix
As of FY 2021/2022

| P&C Staff Member | Sole Source & Exception to Competition Certification | Leases - Real Property | Leases - Equipment | Formal (Bilateral) Contracts | Formal (Bilateral) Amendments & Addenda | Purchase Order Contracts | Change Orders Purchase Order Only |
|---|--|------------------------|--|--|---|--|-----------------------------------|
| Director of Procurement & Contracts | <\$250,000 | See B Below | <\$250,000 Subject to #2 or #1 is required | <\$250,000 Subject to #2 or #1 is required | <\$250,000 Subject to #3 or #4 | <\$250,000 Subject to #2 or #1 is required | <\$250,000 Subject to #3 or #4 |
| Assistant Procurement Director | <\$250,000 | See B Below | <\$250,000 Subject to #2 or #1 is required | <\$250,000 Subject to #2 or #1 is required | <\$250,000 Subject to #3 or #4 | <\$250,000 Subject to #2 or #1 is required | <\$250,000 Subject to #3 or #4 |
| Senior Buyers, Buyers | * | * | * | * | * | <\$75,000 Subject to #2 or #1 is required | <\$75,000 Subject to #3 or #4 |
| Matrix Key: | | | | | | | |
| #1 Office of General Counsel review | | | | | | | |
| #2 Standard UWF Terms & Conditions | | | | | | | |
| #3 If original contract or purchase order is ≥ \$250,000 and was approved and executed by an individual with authority to approve and execute, then limits apply as designated above. | | | | | | | |
| #4 If original contract or purchase order is < \$250,000 and the amendment or change order would increase the total cumulative value of the contract or order to ≥ \$250,000, it must be approved and executed by an individual with authority to approve and execute at or above the proposed new total cumulative contract value. | | | | | | | |
| * No authority expressed or implied | | | | | | | |
| Notes: | | | | | | | |
| Presidential Policy P-04.05-05/18 "Authority to Sign Contracts and Other Documents" is the guiding document on approvals. | | | | | | | |
| A. Any and all levels of authority are subject to review and further limitation on a case by case basis by the appropriate supervisor. | | | | | | | |
| B. Per Delegation of Authority for the Division of Finance and Administration (effective January 1, 2019) all leases must be requested and reviewed by the AVP, Facilities Maintenance and AVP/Controller and signed by VP, Finance and Administration. | | | | | | | |
| C. VP, Finance and Administration signs all contract documents ≥ \$250,000 and ≤ \$500,000 and all Sole Sources ≥ \$250,000. | | | | | | | |
| D. President signs all contracts ≥ \$500,000. Route all requests through VP, Finance and Administration first. | | | | | | | |
| E. Assistant Procurement Director can sign on behalf of the Procurement Director in her/his absence. | | | | | | | |