

## LAMAR UNIVERSITY MANUAL OF ADMINISTRATIVE POLICIES AND PROCEDURES

SECTION: Financial Services  
AREA: General

### Delegation of Authority

MAPP 05.01.06

#### I. POLICY

- A. Lamar University (LU) follows state regulations as well as Texas State University System (TSUS) rules and regulations regarding the delegation of authority for signing contracts, purchases, and agreements on behalf of the University.

#### II. PURPOSE AND SCOPE

- A. In accordance with the TSUS Rules and Regulations, Chapter III, §1, §§1.1, Contracts and §10, Contracts, Purchases and Agreements (as amended) in Texas institutions of higher education

- B. In accordance with the TSUS Rules and Regulations, Chapter III, §10, §§

not enter into contracts in their own names. Contracts are executed by way of two (2) different offices based on contract type.

1. Campus Operations handles all revenue-based and non-monetary contracts.
2. Procurement & Payment Services handles all expense contracts.

#### III. DELEGATION OF AUTHORITY FOR CONTRACTS

- A. The LU President is the primary contracting official for the University. The LU President has authority to enter into contracts on behalf of the University provided that the contract does not require approval from the TSUS Chancellor or Board of Regents.

- B. TSUS Rules and Regulations allow the LU President to delegate power to contract, purchase, or enter into agreements of \$500,000 or less to other employees of the University. VPAA)

as necessary and specified in the temporary delegation. Unless otherwise delegated, in the

absence of a primary approver listed under Section IV of this MAPP, the signature authority shall extend up to the next level of management. For example, when the Director of Procurement & Payment Services

is on leave, authority shifts upward to the Associate Vice President for Financial Services.

- E. The level of authority required to sign a contract on behalf of the University is delineated in the TSUS Rules and Regulations and TSUS Contract Management Handbook. The level required is based on factors such as dollar amount, type of contract, or state required training/certification(s).
  
- F. The written delegation must be on official letterhead and include:
  - 1.
  - 1.



|  |  |                                       |  |                     |
|--|--|---------------------------------------|--|---------------------|
| SREV                                     | Service Agreements; total cost between \$0-\$25,000  | Contract Mgr                          | ED Campus Ops                                      | ED Campus Ops       |
| SREV                                     | Service Agreements; total cost between \$25,000.01-\$500,000   | Contract Mgr                          | ED Campus Ops                                      | COO and CFO         |
| SREV                                     | Service Agreements; total cost between \$500,000.01-\$1M   | Contract Mgr; ED Campus Ops; COO; CFO | President  | Chancellor          |
| SREV                                     | Service Agreements; total cost greater than \$1M   | Contract Mgr; ED Campus Ops; COO; CFO | President; General Counsel; VC Finance, Chancellor | Board of Regents    |
| SPON                                     | Athletic Sponsorships; total revenue between \$0-\$25,000  | Contract Mgr                          | ED Campus Ops                                      | ED Campus Ops       |
| SPON                                     | Athletic Sponsorships; total revenue greater than \$25,000.01  | Contract Mgr                          | ED Campus Ops                                      | COO and CFO         |
| <b>CAMPUS OPERATIONS – MISCELLANEOUS</b> |  |                                       |  |                     |
| Contract Type                            | General Guidelines   | Prepare or Review                     | Approve  | Signature Authority |
| n/a                                      | Purchase, exchange, lease, sales or easements of real property; Board retains authority to approve, except for ground leases of five (5) years; Chancellor is delegated authority to approve valued up to \$3M; President is delegated authority up to \$500,000 | ED Campus Ops                         | Vice Chancellor ew0-0.                             |                     |

|     |  |          |                                      |                     |
|-----|--|----------|--------------------------------------|---------------------|
|     | Governmental Code, family is defined as employee's spouse or spouse's parents, brothers, sisters, grandparents, children, or grandchildren; time granted shall not exceed three (3) days |          |                                      |                     |
| n/a | Emergency bereavement leave requests greater than three (3) days will require an exception   | Employee | Department Head or Direct Supervisor | Assistant VP for HR |

|   |                      |                        |                   |                     |
|---|----------------------|------------------------|-------------------|---------------------|
|   | exceed five (5) days |                        |                   |                     |
| FINANCIAL SERVICES (not related to Procurement) |                      |                        |                   |                     |
| Contract Type                                   | General Guidelines   | Prepare or Review      | Approve           | Signature Authority |
| n/a   | Direct Deposit       | ED Business & Treasury | AVP Financial Svc | CFO                 |
| ACADEMIC or STUDENT RELATED                     |                      |                        |                   |                     |

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|                      | as determined, prescribed and recommended by each Component as specified in Chapter VI, Section 2 of these Rules and Regulations.  |                   |          |                     |
|----------------------|--|-------------------|----------|---------------------|
| <b>MISCELLANEOUS</b> |  |                   |          |                     |
| Contract Type        | General Guidelines   | Prepare or Review | Approve  | Signature Authority |
| Gifts                | Other gifts which exceed \$10,000 in value except cash and securities, when necessary to comply with donor desires, and when recommended by the Component President and approved by the Chairman of the Local Committee of the Board, such gifts may be accepted prior to the next Board meeting, but will be reported to the Board at its next regular meeting. | VPUA              | COO; CFO | Board of Regents    |

Gifts

The President of each Component will report all gifts with a value of at

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|  | pursuit of legislative action. |  |  |  |
|--|--------------------------------|--|--|--|

B. EXPENSE / FINANCIAL contracts (FINANCIAL OPERATIONS): All persons or positions listed on the following chart have been granted delegated authority to sign expense/financial related contracts or agreements on behalf of LU. This delegation list does not circumvent the requirement for contracts to route through all the proper channels prior to being executed, such as requisition approval, legal review, Certified Texas Contract Developer (CTCD) or Certified Texas Contract Manager (CTCM) approvals, etc.

**PROCUREMENT & PAYMENT SERVICES – EXPENSE CONTRACTS (EXP) / Monies paid by LU.**

| Contract Type | General Guidelines  | Prepare or Review | Approve       | Final purchase approval/Signature Authority |
|---------------|---|-------------------|---------------|---|
| n/a           | Non-travel meals and refreshments must serve a legitimate business purpose and must further the mission of the University; only auxiliary, designated, or restricted funds may be used for food or beverage purchases (STATE FUNDS ARE NOT PERMITTED) | Requisitioner     | Dean; Sponsor | CTCD 399.3D85W nBTQ tTc 0 T.7               |

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|-----|--|---------------|---------------|---|
|     | University-related business)   |               |               |   |
| n/a | Awards valued up to \$250 for LU employees or students (with the exception of gift cards or gift certificates which are not allowed); allowed dependent upon funding source                      | Requisitioner | Dean; Sponsor | CTCD and/or CTCM certificate holder with delegation on file |
| n/a | Awards valued exceeding \$250 for LU employees or students (with the exception of gift cards or gift certificates which are not allowed); allowed dependent upon funding source                  | Requisitioner | Dean; Sponsor | CFO; President  |
| n/a | Gifts valued up to \$250 to LU retirees, non-LU employees, or Friends of LU (with the exception of gift cards or gift certificates which are not allowed); allowed dependent upon funding source | Requisitioner | Dean; Sponsor | CTCD and/or CTCM certificate holder with delegation on file |
| n/a | Gifts exceeding \$250 to LU retirees, non-LU employees, or Friends of LU (with the exception of gift cards or gift certificates which are not allowed); allowed dependent upon funding source    | Requisitioner | Dean; Sponsor | CFO; President  |

FEXP Facility Use, non



|       |   |                     |  |  |
|-------|---|---------------------|--|--|
| HOTEL | Hotel Agreements; total cost between \$0-\$100,000  | Contract Specialist | CTCD, CTCM certificate holders with delegation on file | Assistant Dir Procurement & Payment Svc          |
| HOTEL | Hotel Agreements; total cost between \$100,000.01-\$150,000                                 | Contract Specialist | CTCD, CTCM certificate holders with delegation on file | Dir Procurement & Payment Svc; AVP Financial Svc |
| HOTEL | Hotel Agreements; total cost between \$150,000.01-\$500,000                                 | Contract Specialist | CTCD, CTCM certificate holders with delegation on file | CFO; President                                   |
| IDIQ  | Indefinite Quantity Agreements (non-Planning/Construction related); total cost between \$0- |                     |  |  |

|       |  |   |   |  |
|-------|--|---|---|--|
|       | total cost between \$500,000.01-\$1M   | Specialist; Dir Procurement & Payment Svc; COO; CFO         | Counsel; Vice Chancellor                                |  |
| ISNE  | Insurance Agreements; total cost greater than \$1M                             | Contract Specialist Dir Procurement & Payment Svc; COO; CFO | President; General Counsel; Vice Chancellor; Chancellor | Board of Regents                                 |
| INTER | Interlocal or Interagency Agreements; total cost between \$0-\$100,000         | Contract Specialist   | CTCD, CTCM certificate holders with delegation on file  | Assistant Dir Procurement & Payment Svc          |
| INTER | Interlocal or Interagency Agreements; total cost between \$100,00.01-\$150,000 | Contract Specialist   | CTCD, CTCM certificate holders with delegation on file  | Dir Procurement & Payment Svc; AVP Financial Svc |
| INTER | Interlocal or Interagency  |   |   |  |

|    |   |                    |
|----|---|--------------------|
| IT | Software License or non-Library IT related Agreements; total cost greater than \$1M | Contract Sp(t)-3.4 |
|----|---|--------------------|



| PLANNING & CONSTRUCTION |   |                                   |  |   |
|-------------------------|---|-----------------------------------|--|---|
| Contract Type           | General Guidelines  | Prepare or Review                 | Approve                                      | Final purchase approval/Signature Authority |
| EXP                     | Contracts involving planning, design, renovation, or construction of buildings and other physical facilities; total cost between \$0-\$100,000  | AVP Plan & Construction           | AVP Plan & Construction                      | AVP Plan & Construction                     |
| EXP                     | Contracts involving planning, design, renovation, or construction of buildings and other physical facilities; total cost between \$100,000.01-\$500-000   | AVP Plan & Construction           | COO; CFO                                     | COO and CFO                                 |
| IDIQ                    | Indefinite Quantity Agreements for Planning & Construction; to include but not limited to job order construction contracts (JOC); architectural, consulting, engineering, total cost not to exceed \$1M | AVP Plan & Construction           | AVP Plan & Construction; COO; CFO; President | COO and CFO; President                      |
| IDIQ                    | Indefinite Quantity Agreements for Planning & Construction; to include but not limited to job order construction contracts (JOC); architectural, consulting, engineering,; total cost between \$1M-\$2M | AVP Plan & Construction; COO; CFO | President                                    | Chancellor                                  |

EXP

Construction projects in excess of \$4M shall

require specific Bd(cg(eq)-9.1 (u)-9.1 (i)-3.9 (r)-4.4 377.4 0.481 0.481 ret1 rēf724Qq11841 (ec)-2.7 (i)-3.9 (fi)-D-9.1 0 -1.21

|     |  |                         |                         |                                  |
|-----|--|-------------------------|-------------------------|----------------------------------|
|     | Board, when required under Coordinating Board Rules), and prior to starting construction of the project  |                         |                         |                                  |
| EXP | Public Art as it relates to new construction projects  | AVP Plan & Construction | AVP Plan & Construction | AVP Plan & Construction          |
| EXP | New Major Construction; for purposes herein shall mean any new building or addition to an existing building with a total project cost of \$1 million or more; the term does not include projects that consist solely of improvements to campus infrastructure, such as athletic fields, parking areas, chill or utility plants, etc. | COO; CFO                | President               | Board of Regents, as appropriate |
|     | Board delegates to the Chancellor authority to enter into contracts for the design and construction of capital projects with a total project cost under \$4 million. The Chancellor may further delegate his authority.  | COO; CFO                | President               | Chancellor                       |
|     | The Chancellor shall be delegated the responsibility and authority to approve and sign contracts for the design and construction of any capital project with a total project cost of \$1 million or more, provided that the project is included in the CIP approved by the Board.  | COO; CFO                | President               | Chancellor                       |
|     | The President of each Component shall be delegated the responsibility and authority to enter into contracts for the design and construction of any capital project with a  | AVP Plan & Construction | COO; CFO                | COO and CFO                      |

|  |   |                         |          |             |
|--|---|-------------------------|----------|-------------|
|  | total project cost of less than \$1 million.  |                         |          |             |
|  | Notwithstanding the limits stated in 1.82, the President is delegated the authority to enter into contracts for the purchase of furniture, fixtures and equipment for capital projects approved by the Board, to the extent such items are included in the project budget presented to and approved by the Board. | AVP Plan & Construction | COO; CFO | COO and CFO |

C. TRAVEL EXPENSE contracts (FINANCIAL OPERATIONS): All persons or positions listed on the following chart have been granted delegated authority to sign travel related documents for their direct reports. This delegation list does not circumvent the requirement for documents to route through all the proper channels prior to being executed, such as Chrome River.

| PROCUREMENT & PAYMENT SERVICES – TRAVEL RELATED DELEGATIONS            |                                    |   |
|--|------------------------------------|---|
| NOTE: President, CFO, or P-VPAA MUST approval all international travel |                                    |   |
| DELEGATEES   | DELEGATION OF AUTHORITY            |   |
|  | (1) TRAVEL                         | (2) EXPENSE REIMBURSEMENT                             |
| Extent of Delegation   | Direct Reports All Domestic Travel | Direct Reports Expense Reimburse (Not Including Self) |
| Title of Position  |                                    |   |
| Name of Incumbent  |                                    |   |
| Name of Delegate, Title  |                                    |   |
| President  |                                    |   |
| Dr. Jaime Taylor   |                                    |   |
| Amy Troha, Director of Operations                                      | X                                  | X   |
| Vice President for Diversity, Inclusion & Community Relations          |                                    |   |
| Dr. Norman Bellard (interim)   | X                                  | X   |
| n/a  |                                    |   |
| Provost & Vice President for Academic Affairs                          |                                    |   |
| TBD  | X                                  | X   |
| n/a  |                                    |   |
| Dean of Arts & Sciences  |                                    |   |
| Dr. Lynn Maurer  | X                                  | X   |
| Associate Dean, College of Arts & Sciences                             |                                    |   |
| Dr. Tim Roden – Programs   | X                                  | X   |
| Dr. Sunny Lei – Research and Retention                                 | X                                  | X   |
| n/a  |                                    |   |
| Dean of Business   |                                    |   |
| Dr. Dan French   | X                                  | X   |

|  |   |   |
|--|---|---|
| Associate Dean, College of Business<br>Dr. Toni Mulvany  | X | X |
| n/a  |   |   |
| Dean of Education & Human Development<br>Dr. Robert Spina  | X | X |
| Associate Dean of Education & Human Develop.<br>Dr. Rebecca K. Weinbaum  | X | X |
| n/a  |   |   |
| Dean of Engineering<br>Dr. Brian Craig   | X | X |
| n/a  |   |   |
| Dean of Fine Arts & Communication<br>TBD   | X | X |
| n/a  |   |   |
| Associate Dean of Graduate Studies<br>Dr. Brett Welch  | X | X |
| n/a  |   |   |
| Dean of Reaud Honors College & Director of Texas Academy of<br>Leadership in the Humanities<br>Dr. Tilisa Thibodeaux | X | X |
| n/a  |   |   |
| Associate Provost for Academic Affairs<br>Dr. Daniel Brown   | X | X |
| Associate Provost for Academic Affairs and Digital Learning<br>Dr. Poonam Kumar                                      | X | X |
| n/a  |   |   |



|   |   |   |
|---|---|---|
| n/a   |   |   |
| Chief Financial Officer (CFO)<br>Jamie Larson (interim) | X | X |
| n/a<br>Chief Operat                                     |   |   |

VI. APPROVAL

Jamie Larson 05/24/2022  
 \_\_\_\_\_  
 Chief Financial Officer Date

Robert H. Wagner 05/24/2022  
 \_\_\_\_\_  
 Chief Operations Officer Date

Dr. Jaime R. Taylor 05/25/2022  
 \_\_\_\_\_  
 President Date

**REVISION LOG**

| Revision Number | Date       | Description of Changes                                  |
|-----------------|------------|---|
| 1               | 07/26/2021 | Version created.  |
|                 | 08/09/2021 | Version approved by President.                          |
| 2               | 05/24/2022 | Revised to reflect current LU organizational structure. |
|                 | 05/25/2022 | Revised version approved by President.                  |