

PROCUREMENT ACTION MATRIX

This Matrix is intended to provide University Buyers with guidance on the documentation and approvals required for various purchases.

	\$0 - \$4,999	\$5,000 - \$24,999	\$25,000 - \$149,999	\$150,000 - \$649,999	\$650,000 and OVER
SPA Review (For relevant Funding Sources) Vendor Questionnaire (Form W-8 or Substitute W-9 Form) - for new vendors upon setup Worker's Classification Review (For Independent Contractors Only)			Award Flow-down Requirement (Federal Funds Only)	Purchasing Department Involvement Purchasing Department Approval Formal Quote From Vendor Capital Budget Request Form	Purchasing Checklist Establishment of Competition (3 written quotes/proposals) Controlled Bid Process (e.g., \$150-250k: RFI/Q; Greater than \$250k: RFP) Source Justification Price Reasonableness/Cost Analysis Screening Certificate
					SDBC, SWB, Vet & HUB Zone Consideration
SPA Review (For relevant Funding Sources) Vendor Questionnaire (Form W-8 or Substitute W-9 Form) - for new vendors upon setup Worker's Classification Review (For Independent Contractors Only)		Purchasing Checklist Establishment of Competition (3 written quotes/proposals)	Purchasing Department Approval Formal Quote from Vendor Source Justification Price Reasonableness/Cost Analysis University General Terms and Conditions		

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For procurement activity relating to Operating, Gift, Endowment or Capital Funds, the below Matrix is intended for the acquisition of goods and materials and supplies ~~and~~ **NOT SERVICES**

	<u>SPA Review (For Series 2XXXXX Accounting Units)</u> <u>Vendor Questionnaire (Form W-8 or Substitute W-9 Form) - for new vendors upon setup</u>			
				<u>Formal Quote From Vendor</u> <u>Capital Budget Request Form</u> <u>Purchasing Department Involvement</u> <u>Purchasing Department Approval</u> <u>Purchasing Checklist</u> <u>Establishment of Competition (3 written quotes/proposals)</u> <u>Controlled Bid Process (e.g., \$150-250k: RFI/Q; Greater than \$250k: RFP)</u> <u>Source Justification</u> <u>Price Reasonableness/Cost Analysis</u> <u>University General Terms and Conditions</u> <u>SDBC, SWB, Vet & HUB Zone Consideration</u>