

The Procurement Process

University [purchasing policies](#) have been developed consistent with state law to ensure a fair, efficient and competitive purchasing process. The purchasing policies must be followed regardless of fund source. This page provides a step-by-step guide to successfully following the purchasing policies for all University purchases.

Step 1. Determine what you need to purchase. The purchase of [certain goods and services](#) have additional requirements as well as those listed below. In addition, the purchase of [facility planning, design and construction](#) follows a different process.

Step 2. Contact [Purchasing Services](#) to determine whether an existing University contract, state contract or cooperative purchasing group contract exists under which the purchase can be made. If so, the competitive selection process is considered satisfied and the next step is the contract review process. Follow the [guidance for Contracting at CSU](#). Contact the Office of General Counsel with any contract- related questions.

Step 3. Determine how much the purchase will cost.

Step 4. Based on the value, determine the process that must be used.

- a. If the purchase will cost \$10,000.00 or less, it is exempt from the competitive selection process. You can go straight to Step 5.
- b. If you are purchasing goods or services valued between \$10,001.00 and \$49,999, obtain at least two (2) quotes.
- c.

vendor's services periodically throughout the year, determine the total value for the fiscal year and use the appropriate purchasing process.

Step 5. Solicitation (RFQ) - If a purchase requires a competitive selection process used, you will submit your quotes / bids / proposals through MagnusMart to Purchasing Services for approval. If Purchasing Services approves your preferred vendor, a Purchase Order ("PO") will be generated and sent to the vendor. **Do not confirm any purchase with a vendor until it has been approved by Purchasing Services. Goods / services may not be received to purchasing process.**

Guidance for Making Purchases using Existing Contracts

Purchasing goods or services through an existing contract may simplify the purchasing process, because the competitive selection is considered satisfied. There are three types of existing contracts that may be used:

[State Contracts](#) – those entered into by the State of Ohio for the benefit of all state agencies and institutions.

[Cooperative Price Agreements](#) – contracts entered into by the Inter-University Council (“IUC”) Purchasing Group or other cooperative purchasing organizations on behalf of Ohio’s public colleges and universities.

Existing CSU Contracts – those entered into by Purchasing Services on behalf of the University as a whole.

Purchasing Services can help you determine whether there is an existing State Contract, Cooperative Price Agreement, or Existing CSU Contract that includes products or services that meet your needs. You may also search the [state contract](#)

Guidance on Obtaining a Quote for Goods

Any purchase of goods valued between \$10,001.00 and \$49,999 must be done competitively by obtaining at least two quotes unless:

- The purchase is made using an Existing Contract; or
- Fewer than two vendors responded to your request for quotes.

The process to obtain quotes is as follows:

1. Contact at least two vendors with a list of items needed. This contact may be made by email or by phone, but the vendors must respond in writing. If you do not know of two vendors, contact Purchasing Services who can research vendors for you. At least one [MBE](#) or [EDGE](#) certified vendor should be included where possible. Purchasing Services can assist in identifying MBE and EDGE certified vendors.
2. Request a quote in writing. The written quote may be an email response. A **screen shot of c'xgpf qt a'rt lepi 'lt qo 'ku'y gdukg'ku'pqv'cegr wdig'**– vendors may give preferential pricing to CSU.
3. Once two quotes are obtained, select the “[lowest responsive vendor.](#)” The lowest responsive vendor is the one that will provide the requested goods at the lowest price. A vendor other than the lowest responsive vendor may be selected only when it is in the best interest of the University to do so, as determined by a Vice President, Senior Vice President, or the President.
4. Upload all quotes into MagnusMart when creating a Requisition. The winning quote should be uploaded as an “external document” and will be sent to the vendor with the PO. The other quote should be uploaded as “internal documents” to demonstrate to Purchasing Services that a competitive selection process was followed. If a vendor other than the lowest responsive vendor has been selected, upload the justification for the selection, signed by the appropriate Vice President, Senior Vice President, or the President, as an “intern a re .”

Guidance on Obtaining a Quote for Services

Any purchase of services valued between \$10,000.01 and \$49,999 must be done

Guidance on Obtaining a Waiver of Competitive Procurement

When the cost of the purchase is above the [Bid threshold](#), there are only two circumstances in which a competitive procurement process may be waived:

- The purchase is an [emergency procurement](#); or
- The purchase is a [sole source procurement](#).

Emergency Procurement

An emergency procurement is authorized when it is necessary to correct or prevent an emergency health, environmental or safety hazard and/or enable the emergency repair or replacement of existing equipment essential for daily operations.

In order to obtain approval for an emergency procurement, complete the [Purchasing Services Waiver of Competitive Bidding Form and Emergency Procurement Authorization Form](#) and obtain the appropriate signatures.

In addition to obtaining approval from Purchasing Services, approval of an emergency procurement must also be obtained from one of the following, based on the area affected:

- Director of Facilities Management
- Director of Public Safety
- Director of Environmental, Health & Safety
- Associate Director of Purchasing Services

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In order to obtain a waiver to allow a sole source procurement, you must contact Purchasing Services prior to contacting the vendor to discuss whether a sole source procurement is justified. A compelling sole source request makes a clear and convincing link between the purchase requirements and why the sole source is the only vendor capable of meeting those requirements. Examples of the primary, acceptable justifications for sole source purchases are:

Compatibility with existing equipment: This justification may be acceptable if the products or services are being purchased to directly interface with or attach to equipment of the same manufacturer, and no other manufacturer's products will correctly interface with existing equipment.

Compatibility for instructional purposes: This justification may be appropriate if the products are being purchased to supplement existing equipment in a classroom. The product to be purchased must exactly match the existing equipment in order to provide uniformity for instructional purposes.

Compatibility for research: This justification may be acceptable if the main purpose for acquiring the equipment or supplies is to replicate specific experiments, using the exact products that produced the original results. This justification may also be acceptable if the purchaser is collaborating with another researcher and can show that identical products are required to fulfill the purchaser's part of the research.

Only one supplier can be identified to supply a compliant product or service: In rare cases, only

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The ITB process is used to procure goods and supplies (and rarely services) with an estimated purchase price of \$50,000 or more. How long an ITB process takes largely depends on the how long it takes the purchaser to prepare the ITB and to review the bids after they are received. There is a minimum of 15 days posting time, so it is recommended that at least thirty (30) days be allotted for the ITB process.

A. Preparing the ITB (approximately 1-2 weeks)

1. Consult with Purchasing Services before issuing an ITB. Purchasing Services is familiar with the various contracts, price practices, discount levels of various vendors, and can determine if there is an Existing Contract that can be utilized. Purchasing Services can also provide advice on whether a pre-bid conference would be useful.
2. If Purchasing Services determines that an ITB needs to be issued, Purchasing Services will email the current ITB template to the user department. The ITB template consists of: the ITB cover page, the ITB Schedule of Events, ITB Instructions and Information, Terms & Conditions applicable to any resulting purchase, Bidder Required Submittals and Signature page, Bidder Certification page, Bidder Contact Information page, Bidder References page, ITB Specifications page, and Bidder Compliance with ORC 3345.10 (for printing services.)
3. The user department must add the following to the ITB template:
 - a. summary of goods to be purchased;
 - b. preferred date and time of ITB opening (must be a minimum of 15 days from the date the ITB is posted);
 - c. date and time of pre-bid meeting (if applicable);
 - d. date questions are due;
 - e. specifications of the goods or supplies being solicited. This is one of the most important parts of the ITB. Specifications specify the characteristics of the goods or supplies the University seeks to purchase; specifications should not consist of a model or part number from a specific manufacturer except in cases where the University requires an item for repair of existing equipment.
 - f. any additional terms and conditions specific to the goods to be purchased.
4. The user department sends the completed ITB to Purchasing Services via email along with a list of vendors to be sent the ITB, including MBE vendors where possible.
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Information regarding the RFP process

The RFP process is used to procure professional services with an estimated purchase price of \$50,000 or more. How long an RFP process takes largely depends upon how long it takes the user department to prepare the RFP, the length of time to review the proposals received, plus a minimum of 15 days posting time. It is recommended that at least 60 days be allotted for the RFP process.

A. Preparing the RFP

1. Consult with Purchasing Services before issuing an RFP. Purchasing Services is familiar with the various contracts, price practices, and discount levels of various vendors.
2. If Purchasing Services determines that an RFP needs to be issued, Purchasing Services will email the current

B. After the RFP is posted

1. Purchasing Services will receive and accept questions from proposers via fax until the date and time listed in the RFP.
2. Purchasing Services will date/time stamp and forward all questions received by the due date and time listed in the RFP to the user department for answering. Purchasing Services will establish a due date for the user department's response.
3. The user department should provide to Purchasing Services answers to all questions as follows: list the question and then the answer; do not list any vendor name.
4. Purchasing Services will create an addendum containing the answers provided by the user department to all questions asked within the allotted time frame and will post the addendum on the Purchasing Services website.
5. If applicable, the user department and Purchasing Services will hold a pre-proposal meeting. Purchasing Services will provide a proposer sign in sheet, which will be kept in Purchasing Services' file.
6. Sealed proposals will be accepted and date/time stamped by Purchasing Services until the RFP due date/time.
7. At the RFP due date/time, Purchasing Services will open all sealed proposals received by the RFP due date/time and prepare a preliminary RFP response sheet by vendor name. The proposal opening is open to the public.
8. For each proposal received, Purchasing Services will retain one original and provide copies to the user department for review.
9. A review committee consisting of a minimum of 3 people will review each proposal.
10. If the RFP requires proposer presentations, the review committee and the user department will schedule and conduct the proposer presentations.
11. Each member of the review committee will individually complete a scorecard for each proposal and the committee chair will collect and send all scorecards to Purchasing Services along with the review committee's written explanation of the recommendation for award. Proposals are ju

If any terms of the Service Agreement Template are revised, the Office of General Counsel