

# Procurement – Fast Facts

## Threshold Guideline Matrix

Dollar Amount of Purchase Order	Federally Funded Programs (Grants and Contracts)	University Use Non-Federal Sponsored Funds
Up to \$3,500	Single quote or scope of work for certain services is needed - check iBuy+ first. No justification for award required	Single quote or scope of work for certain services is needed - check iBuy+ first. No justification for award required
\$3,501 - \$25,000	<p><b>Required Documentation:</b></p> <ul style="list-style-type: none"> <li>-3 Written quotes by Procurement (requestor may conduct market research only)</li> <li>- Complete the Requirements Document form</li> <li>-Scope of work or specifications/Flow-down terms</li> <li>-Evaluation Committee Composition</li> <li>-RFP: Pre-determined Evaluation Criteria with negotiated award.</li> <li>-Sealed Bids: Award based on price alone</li> </ul> <p>-FOR- <b>*Sole/Named Source</b></p> <p><b>Required Documentation:</b></p> <ul style="list-style-type: none"> <li>-Scope of work/specifications and/or contract</li> <li>-<a href="#">J&amp;A Form</a></li> </ul>	<p>Single quote or scope of work for certain services is needed - check iBuy+ first</p> <p>No justification for award required but - competition is encouraged</p>
\$25,001 - \$150,000	<p><b>Required Documentation:</b></p> <ul style="list-style-type: none"> <li>-Competition must be conducted by Procurement:</li> <li>-Complete the Requirements Document form</li> <li>-Scope of work or Specifications/Flow-down terms</li> <li>-Evaluation Committee Composition</li> <li>-RFP: Pre-determined Evaluation Criteria with negotiated award.</li> <li>-Sealed Bids: Award based on price alone</li> </ul> <p>-FOR- <b>*Sole/Named Source</b></p> <p><b>Required Documentation:</b></p> <ul style="list-style-type: none"> <li>-Scope of work/specifications and/or contract</li> <li>-<a href="#">J&amp;A Form</a></li> </ul>	<p><b>Required Documentation:</b></p> <ul style="list-style-type: none"> <li>-3 Written quotes by Procurement or requestor</li> <li>-Scope of work or Specifications</li> <li>-<a href="#">Supplier Selection Memo</a> justifying decision for award required unless sourced by Procurement – 3 written quotes are required.</li> <li>-RFP: Pre-determined Evaluation Criteria with negotiated award.</li> <li>-Sealed Bids: Award based on price alone.</li> </ul> <p>-FOR- <b>*Sole/Named Source</b></p> <p><b>Required Documentation:</b></p> <ul style="list-style-type: none"> <li>-Bids/Proposals</li> <li>-<a href="#">Supplier Selection Memo</a> justifying decision for award unless sourced by Procurement</li> </ul>
\$150,001 & above	<p><b>Required Documentation:</b></p> <ul style="list-style-type: none"> <li>-Formal Solicitation via RFP or Bid conducted by Procurement</li> <li>- Complete the Requirements Document form</li> <li>-Scope of work or Specifications/Flow-down terms</li> <li>-Evaluation Committee Composition</li> <li>-RFP: Pre-determined Evaluation Criteria with negotiated award.</li> <li>-Sealed Bids: Award based on price alone</li> <li>-Independent Cost Estimate before issuing Bid/RFP Cost or Price Analysis prior to award.</li> </ul> <p>-FOR- <b>*Sole/Named Source</b></p> <p><b>Required Documentation:</b></p> <ul style="list-style-type: none"> <li>-Scope of work/specifications and/or contract</li> <li>-<a href="#">J&amp;A Form</a></li> </ul>	<p><b>Required Documentation:</b></p> <ul style="list-style-type: none"> <li>- Formal Solicitation via RFP or Bid (thru Procurement unless delegated)</li> <li>-RFP: Scope of Work, Evaluation Criteria and Evaluation Committee composition</li> <li>- Sealed Bids: Award based on price alone.</li> <li>-<a href="#">Supplier Selection Memo</a> justifying award decision if not sourced by Procurement - 3 written quotes are required.</li> </ul> <p>-FOR – <b>Sole/Named Source</b></p> <p><b>Required Documentation:</b></p> <ul style="list-style-type: none"> <li>-Bids/Proposals</li> <li>-<a href="#">Supplier Selection Memo</a> justifying decision for award unless sourced by Procurement</li> </ul>

- NOTES:**
1. All J&A and SSM forms require Procurement’s approval prior to electronic approval of Purchase Orders and submission of Expense reports for p-cards.
  2. No need for competition or J&A/SSM forms when transactions are for a sub-award/sub-recipients.
  3. Federally funded construction contracts over \$650,000 subject to FAR rules - see Procurement.
  4. Soles Source means only one **known** vendor possesses the unique capability to meet the requirements–See [2CFR 200.317-326](#).
  5. For Named Source, vendor must be specifically named in the budget approved by the sponsoring agency