PLANNING

- Determine intended contract length for:
  - One time purchase – skip this step
  - Purchase over a period of time – Determine total contract term (initial term + any anticipated extensions)
- Determine estimated total purchase value for (if over $250,000, STOP and contact Procurement):
  - One time purchase – total cost for all items, including peripherals, shipping and handling, etc.
  - Purchase over a period of time – total value of contract over the total contract term
- Develop your request:
  - Identify specifications or statement of work
  - Identify OSU contact for questions, clarifications and quote proposal submission
  - Identify due date for quotes/proposals
  - Determine if you may select multiple suppliers (if yes, STOP and contact Procurement)

Additional considerations based on evaluation type:
- **Price Only** – selection of equivalent items where price is the only differentiation
  - OPTIONAL, use the OSU Quote Request Form (See Resources)
- **Best Value** – selection is based on multiple criteria, not just price
  - Identify any requested qualifications or certifications
  - Identify requested documents for proposal submission
  - Determine whether a pre-proposal meeting is needed
    - If yes, identify the date, time and location of the pre-proposal meeting
  - Determine whether to have a question/clarification period for potential proposers
    - If yes, identify the date and time questions/clarifications must be received
  - Develop your evaluation criteria and review committee
    - OPTIONAL, use the Proposal Request Form (See Resources)
  - Identify suppliers who may meet your need (consider business registered with the Certification Office for Business Inclusion and Diversity (COBID) - https://www.oregon.gov/biz/programs/COBID/Pages/default.aspx

LAUNCH

- Send request to two or more potential suppliers
  - **Price Only**: As applicable, obtaining web or verbal quotes is acceptable
  - **Best Value**: As applicable, perform pre-proposal meeting and respond to questions/clarifications
  - Collect quotes/proposals prior to due date and time

EVALUATION

- **Price Only**: lowest price supplier is selected
- **Best Value**: Committee members evaluate proposals
  - Collect evaluations and determine selected supplier

COMPLETION

- Complete Documentation of Competition Form
- Assemble all competition documentation (written communications, narrative of verbal conversations, quotes, proposals, evaluation criteria, evaluations, etc.)
- For purchases using federal funds, complete a Federally Funded Purchase Checklist (See Resources)
- If applicable, attach contract or agreement (supplier provided or OSU template)
- Submit all of the above in BennyBuy
Here are two ways to submit in BennyBuy:

**Purchase Request Form**
- Generates a Purchase Order (but can be used for other contract types)
- Encumbers funds
- Obtains budget approvals
- Requires prior supplier registration in BennyBuy to process
- Good for one time purchases
- Good for purchases done within a FY

**Contract Request Form**
- Requires another contract type (supplier provided, OSU template, etc.)
- Does not encumber funds
- Does not obtain budget approvals
- Does not require prior supplier registration in BennyBuy to process
- Good for multiple year contracts
- Good for master contracts or agreements

**RESOURCES**

**Procurement Website**
- OSU Standard 03-010 Procurement Thresholds and Methods
- Procurement and Contract Services Policies and Procedures Manual
- Forms:
  - Documentation of Competition
  - Quote Request Form
  - Proposal Request Form
  - Personal Services Contract (PSC) template
  - Federally Funded Purchase Checklist

**Training and Support**
- Video Trainings:
  - Procurement Standards and Resources
  - Federal Purchases Under Uniform Guidance
  - Informal Procurement Training
- Reference Materials
  - Procurement Contract Signatures – Campus Guide
  - Campus Guide to Personal Services Contracts

**Email**
- For procurement support: pacs@oregonstate.edu
- For BennyBuy support: dfa.tech@oregonstate.edu

(Updated: November 2, 2023)