

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

- Step 5. Submit your preferred vendor request to Purchasing Services. Depending on the 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 by the University until the vendor has received a P.O.**
- Step 6. Once the purchase has been approved by Purchasing Services, the procurement process is complete.
- Step 7. For purchases resulting from an ITB procurement process, the ITB together with the winning bid are the contract. For purchases resulting from a RFP procurement process, the RFP together with the winning proposal, and the University's Services Agreement Template is the contract. For purchases of services, the ["Services Agreement Template"](#) is preferred in all cases. If a contract other than the University's template is to be used or if any changes are made to the terms of the University's Services Agreement Template, the [Office of General Counsel](#) must approve the contract as to legal form before it is signed by the [authorized University signatory](#).
- Step 8. Receive your goods / services and create a receipt in MagnusMart.
- Once you have received your goods / services, create an invoice for payment through MagnusMart.

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](#) website and the [IUC Purchasing Group](#) website.

Cite the Existing CSU Contract or State Contract number when creating the purchase requisition in MagnusMart. Do not sign any other contract, statement of work, terms of sale, terms and conditions, etc., even if asked to do so by the vendor and contact Purchasing Services as any such additional contract, statement or work, etc. must be reviewed as to legal form by the Office of General Counsel. If Purchasing Services determines that an IUC Price Agreement is available, Purchasing Services will forward the IUC Price Agreement to the Office of General Counsel for review as to legal form and will inform the CSU Office/Department when such review is completed and may be uploaded into MagnusMart along with the Requisition.

Guidance on Obtaining a Quote for Goods

Any purchase of goods valued between \$2,501 and \$24,999 must be done competitively by obtaining at least three quotes unless:

The purchase is made using an existing contract [hyperlink to guidance on using an existing contract]

Fewer than three vendors responded to your request for quotes.

The process to obtain quotes is as follows:

1. Contact at least three 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 three 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** **qh" c" xgpfqtøu" rtkkpi" htq o" kvu" ygdukv" ku" pqv" ceegrvcđng"** – vendors may give preferential pricing to CSU.
3. Once three 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.

Guidance on Obtaining a Quote for Services

Any purchase of services valued between \$2,501 and \$49,999 must be done competitively by obtaining at least three quotes unless:

The purchase is made using an existing contract [[hyperlink to guidance on using an existing contract](#)]

Fewer than three vendors responded to your request for quotes.

The process to obtain quotes is as follows:

1. Contact at least three vendors with a description of the scope of work for the services needed. This contact may be made by email or by phone, but the vendors must respond in writing.

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 the quote** – vendors may give preferential pricing to CSU.
3. Once three quotes are obtained, select the vendor who provides the “most advantageous” quote. The most advantageous quote may not be the least expensive quote, but cost should be a consideration in determining which quote is most advantageous. If the lowest cost vendor is not selected, prepare a written justification as to why the selected vendor was superior to any lower cost vendors.
4. Upload all three quotes into MagnusMart when creating a Requisition. Upload the winning quote as an “external document”, which will be sent to the vendor with the PO after it is approved by Purchasing Services. Upload the other two quotes 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 “internal document.”
5. If fewer than three quotes are obtained, upload the justification as an “internal document.” The justification may be an existing contract or a statement that quotes were sought from three or more vendors, but fewer than three chose to provide a quote.

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

For purchases of \$50,000 or more, the controller or designee must also approve the purchase.

Once all signatures are obtained, upload the waiver form as an internal document in MagnusMart when processing the purchase requisition.

Sole Source Procurement

Sole source procurement is only permitted in the unusual or infrequent circumstance in which there is only one appropriate supplier. This is usually because of the technology involved, or when the good is proprietary or unique in nature. **Convenience, knowledge of CSU, status as a current supplier, or preference for a brand name are not adequate justifications to obtain a sole source waiver. Claims by the purchaser that a specific product is considered a sole source are not sufficient for a sole source purchase as the bid process will either serve to confirm the finding or uncover alternative solutions.** If there are several sources that provide a similar product, the purchase must be made on a competitive basis. Services are considered sole source purchases only under the rarest of circumstances and requests are subject to additional scrutiny by the Office of General Counsel.

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B. After the ITB is posted (approximately 15-20 days)

1. Purchasing Services will receive and accept questions from bidders via fax until the date and time listed in the ITB under "ITB Questions Due".
2. Purchasing Services will date/time stamp and forward all questions received by the due date and time listed in the ITB to the user department for answering.
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 within 48 hours.
5. If applicable, the user department and Purchasing Services will hold a pre-bid meeting. Purchasing Services will provide a vendor sign-in sheet, which will be kept in Purchasing Services' file.

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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 it59

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

If any terms of the Service Agreement Template are revised, the Office of General Counsel must approve as to legal form the changes before the contract is finalized and entered into Magnus Mart.