PLANNING
- Determine intended contract length for:
  - ☐ One time purchase – skip this step

    OR
  - ☐ 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.

    OR
  - ☐ 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
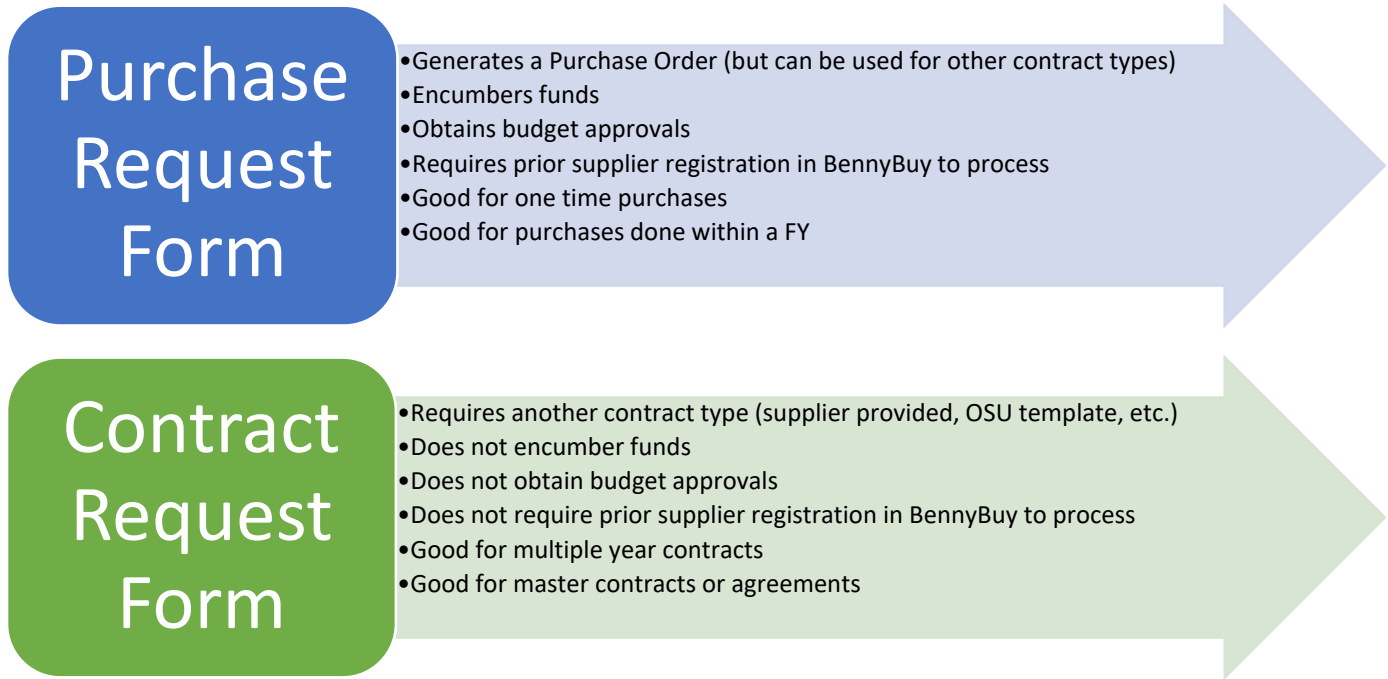- ☐ Collect quotes/proposals prior to due date and time

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

SUBMISSION 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

Faculty and Staff

https://fa.oregonstate.edu/pacs/faculty-staff

- 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

https://fa.oregonstate.edu/pacs/training-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)