



Purchasing Guide

- * The Purchasing Division has the authority and establishes procedures to facilitate the purchase of equipment, materials, commodities, supplies, and services. “No other individual on campus has authority to commit the University to purchasing goods and services, unless that authority has been specifically delegated to them.”
- * For purchases that are \$25,000 and above, the vendor must complete and sign the disclosure and conflict of interest documentation before a purchase order can be issued.

Process	Unit’s Role and Responsibility	Purchasing Role and Responsibilities
Small Purchases Equipment & General Services ≤ \$51,300 NOTE: For construction projects, contact the Buyer.	<ol style="list-style-type: none"> 1. Obtain vendor quote(s). 2. Submit a requisition through iBuy or Banner, to Purchasing, along with any attachments which may go with the order. <p>Note: The requisition number should always be on the attachment. If sending attachments electronically, reference requisition number in the subject line of the email.</p>	<ol style="list-style-type: none"> 1. Purchasing will review for best business practices and issue the purchase order and/or contract.
Professional & Artistic Services (P & A) Services ≤ \$5,000	<ol style="list-style-type: none"> 1. Complete the Contract for P&A under \$5,000.00. 2. Obtain the vendor’s signature prior to commencement of services. 3. Prepare an invoice voucher, attached the signed contract and send to University Payables for processing. <p>*Note: If the vendor is requesting any change(s) to the standard P&A contract under \$5,000.00, you must submit a requisition, quote, and what the vendor has requested to Purchasing.</p>	<ol style="list-style-type: none"> 1. If changes have been made to the standard P&A contract, then Purchasing will review. 2. Purchasing will issue a purchase order.
Professional & Artistic Services (P & A) Services > \$5,000 and < \$20,000	<ol style="list-style-type: none"> 1. Obtain a quote from the vendor. 2. Prepare the Professional and Artistic Services Information Form (PASIF). 3. Submit your requisition through iBuy or Banner, along with the quote and the PASIF to purchasing. 	<ol style="list-style-type: none"> 1. Purchasing will review and prepare a contract. 2. Upon receipt of the fully executed contract, the purchase order will be issued.
Sole Source Purchase Only One Sole Source Available for Equipment and General services > \$51,300 Or Only one Qualified source available for Professional & Artistic services ≥ \$20,000	<ol style="list-style-type: none"> 1. Complete the Sole Source Justification Form. 2. Submit your requisition via iBuy or Banner, along with a quote from the vendor and sole source form to Purchasing in Word format. 	<ol style="list-style-type: none"> 1. Review Sole Source Justification form and perform due diligence. 2. Post intent to award on Bulletin. 3. Conduct a Sole Source Public Hearing. 4. Post hearing documents on Bulletin. 5. Issue purchase order and/or contract.

Process	Unit's Role and Responsibility	Purchasing Role and Responsibilities
Sealed Bid Equipment and General Services > \$51,300	<ol style="list-style-type: none"> 1. Department submits a requisition and specifications, in a Word document, to Purchasing. Note: Vendor name should be "Bid" and dollars should be estimated. 2. Department works with Purchasing on specifications to meet requirements. 3. Works with Purchasing to answer questions from vendors/bidders during process. 4. Evaluates vendor proposal. 5. Submits recommendation memorandum. 	<ol style="list-style-type: none"> 1. Evaluates specifications and works with department to finalize. 2. Advertise on Bulletin. 3. Monitors bid process, opens proposals, determines which vendors are responsive and notifies the department of final number of responsive/responsible bidders. 4. Sends bid proposals to department for evaluation. 5. Works with vendor on compliance and obtains approvals and signatures. 6. Review department recommendation. 7. Prepares contract and routes for signature, if applicable. 8. Posts award(s) on bulletin. 9. Issues purchase order.
Request for Proposal (RFP) Professional & Artistic Services ≥\$20,000 Equipment and General Services > \$51,300	<ol style="list-style-type: none"> 1. Submit requisition & the PASIF 2. Complete requirements of Reference Guide, submit requisition. Note: Vendor name should be "RFP" and dollars should be estimated. 3. Work with Purchasing on developing RFP, provide list of proposed vendors. 4. Establish Evaluation team: Provide list of evaluators to Purchasing (name, title, department & signed confidentiality statement). 5. Establish Evaluation matrix (Pricing must be at least 30%) & submit to Purchasing. Note: Purchasing cannot release vendor proposals to department until matrix, list of members & confidentiality statements are received. 6. Review Technical proposals. Score each Vendor. 7. Request demos if applicable. 8. Provide individual and summary technical scores to Purchasing. Purchasing will then provide pricing to department to evaluate. 9. Review and score pricing 10. Request demos if applicable. 11. Submit list of questions/clarification points and areas to request reduced pricing to Purchasing. 12. Review "Best & Final", make Vendor determination & notify Purchasing via recommendation memo. 	<ol style="list-style-type: none"> 1. Purchasing will meet and discuss requirements and help develop RFP. 2. Create RFP and send to department for approval. 3. Advertise on Bulletin. 4. Work with department to answer vendor questions. 5. Open proposals and determine which vendors are responsive. 6. Send responsive vendor proposals to department to review and evaluate. 7. Assist department with scoring of Technical Proposals. 8. After receiving technical scores from department, forward pricing proposals to department to review and evaluate. If demonstrations/presentations are needed, work with department to schedule. 9. After receiving evaluation matrix (combination of pricing and technical scores) from department, help develop Best and Final offers. 10. Send Best and Final Offer(s) to vendor(s). 11. Evaluate Best and Final Offer(s) and send to department to review and make determination. 12. After receiving department recommendation memo, negotiate terms and conditions with vendor. 13. Prepares contract and routes for signature, if applicable. 14. Post award(s) on Bulletin. 15. Issues purchase order(s).
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