

Purchasing Quick Reference Guide

Determine Purchase Type:
GOOD or **SERVICE**

Determine Estimated Value

Less than \$2500

GOOD or **SERVICE**

- Verbal approval from supervisor/manager/director;
- Purchase made with credit card or check request (open account);
- Competitive bid process not required.

\$2500 to less than \$35,000

GOOD

- Department purchases following purchasing procedures;
- OR required;
- Use competitive bid process with 3+ quotes;
- Process an OR and obtain PO number prior to purchase;
- Purchase made direct by department using a PO;
- Confirming copy of PO sent to vendor.

SERVICE

- Department purchases following purchasing procedures using PO, Contractual Services Agreement "CSA" or Professional Service Agreement "PSA";
- OR required;
- Use competitive solicitation process with 3+ quotes;
- Services ordered by department referencing PO number, CSA, or PSA.
- Confirming copy of PO, CSA, or PSA sent to vendor.

\$35,000 and over

GOOD

- Processed by Purchasing upon receipt of OR in JDE (OB blanket orders are processed with a hard copy OR);
- OR required with back up material including detailed specifications, budget amount, and brief justification summary;
- Purchasing prepares board communications, bid documents, and completes formal bid process;
- Purchase made by Purchasing after board approval.

SERVICE

- Department solicits services following Formal Request for Proposal process. Department prepares request for proposal, board communications, conducts formal proposal process, and completes the purchase using a CSA or PSA.

Verify items are not available under an OB or OX prior to individual purchase; OR=Order Requisition; PO=Purchase Order (OP, OB, OX, OK, OO, & OS); CSA= Contractual Service Agreement; PSA=Professional Service Agreement; Public Works Construction Contracts are generated and managed by Facilities & Operations and Engineering & External Affairs.