



Procurement Quick Reference Guide

For additional questions contact (660) 543-4001 or procurement@ucmo.edu

Level 1 -- \$1-\$24,999.99 – Departmental One-Time Purchase (Does not apply to multiple purchases totaling over \$25K)

Preferred Procurement Type: UCMarket

Preferred Payment Type: Check or ACH

Non-Catalog items in this section may be paid for with a Business PCard (BPC) if cost is under \$1000 (Or higher limit with Procurement Approval)

Department Responsibilities:

- * Verify that no contracts exist in Ionwave Contract Management for same services or using same proposed vendor prior to requesting quotes.
- * Request new supplier registration information if a new Vendor.
- * Obtain either a minimum of three (3) quotes or issue informal solicitation through Procurement.
- * Attach quote to requisition and create requisition in UCMarket.
- * See (Requisition Training Guide) for instructions for more information.
- * Refer to Business Procurement Card Operating Policies and Procedures Manual.
- * Refer to Procurement Manual for additional details.

Procurement Role:

- * Provide Support to department as needed.
- * Complete new online vendor registration process.
- * Issue quotes if requested.
- * Obtain Legal approval if Term and Conditions are required by Vendor.

Process 2 – Over \$25,000.00 – Formal Procurement

Department Responsibilities:

- * Verify that no contracts exist in Ionwave Contract Management for the same services or with the same vendor prior to requesting bids.
- * Estimates may be obtained from a vendor for budget reasons but should not result in a full demonstration resulting in specs that give an advantage to any one company.
- * Request new supplier registration information if a new Vendor.
- * Submit a request to Procurement to issue a bid.
- * Submit technical specifications, known suppliers, funding source, and any other pertinent information to Procurement.
- * Refer to Procurement Manual for additional details.

Procurement Role:

- * Review specifications
- * Prepare Formal Solicitation in Ebid.
- * Send out advertisements as needed.
- * Provide bid tab details for evaluation following close and execute contract.

- * The Procurement Office has the sole authority in determining the final purchasing method for any item.
- * Life of contract/purchase order or repetitive purchases determines the dollar threshold for all types of solicitations.



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Process 3 – Federal Grants or State of MO Pass-Thru Grants - \$0 and Up

Refer to UCM Federal Procurement Manual on Procurement Website – **Do not proceed with any procurement functions including request for quotes until reviewing and following Federal Procurement Manual.**

Micro-Purchase - \$0 - \$10,000.00

Formal Procurement - \$10,001 and Up

Note: Most UCM Contracts cannot be used for Federally funded Procurements.

Contact UCM Procurement Office asap to assist with procurement functions using Federal funds.

UCM Federal Procurement Manual is on Procurement website.

Process 4 - \$25,000.00 and Up – Request for Qualifications (RFQ)

* Verify that no contracts exist in Ionwave Contract Management for these services prior to requesting quote or other information from proposed vendors.

* This is a qualifications-based process for the acquisition of Professional Engineers and Architects. No other option is available for hiring firms for this purpose. Utilizes Brooks Act processes.

* Utilizes Procurement Template for Vendor Requirements and Scoring.

* Does NOT allow the use of cost to determine the highest scoring Vendor.

* Can only be done through the Procurement office using the Ionwave system.

* Departments provide technical information to Procurement which is then plugged into the template and scoring process.

Process 5 \$25,000.00 and Up – Request for Proposals (RFP)

* Verify that no contracts exist in Ionwave Contract Management for similar services or with same proposed vendors.

* Cost and Qualifications based process for the acquisition of software and other services which should not be awarded on the merit of cost alone.

* Utilizes Procurement Template for Vendor Requirements and Scoring.

* Must use cost to determine the highest scoring Vendor.

* Can only be done through the Procurement office using the Ionwave system.

* Departments provide technical information to Procurement which is then plugged into the template and scoring process.

*The Procurement Office has the sole authority in determining the final purchasing method for any item.

* Life of contract/purchase order or repetitive purchases determines the dollar threshold for all types of solicitations.



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Process 6 – \$25,000.00 and Up – Sole Source

Note: Sole Source is defined as being only one vendor for one product in the entire world. If multiple companies can sell the one product it is not Sole Source. If other companies have a product with similar salient characteristics, it is not a sole source. Do NOT compare other products or services against each other and then determine the preferred product to be Sole Source.

Department:

*** Must get approval from buyer of record and the Procurement Director before moving forward.**

* Verify that no contracts exist in Ionwave Contract Management for similar services or same vendor prior to requesting quote or other information.

* Request new supplier registration information if a new Vendor.

*** Complete and Submit a Sole Source form to Procurement prior to issuance of requisition.**

* Submit technical specifications, quote, Terms and Conditions and any other documentation as an attachment to the requisition being issued.

* Refer to Procurement Manual for additional details.

Procurement Role:

* Review Sole Source Form and determine if applicable.

* If Sole Source is not applicable, request information and prepare Formal Solicitation.

Process 7 – Piggyback/Cooperative Contract

Department:

NOTE: Not all contracts from other entities may be piggybacked.

NOTE: Departments are not allowed to place orders or accept terms of a cooperative contract without Procurement approval in advance.

NOTE: Procurement may decide to issue a UCM Piggyback Contract if there is a chance that the contract may be used by other departments, or the product/service is a high cost, or services provided are on-campus, or multiple purchases will be made over a pre-determined period.

* Verify that no contracts exist in Ionwave Contract Management for similar services or same vendor prior to requesting quote or other information from Vendor.

* If contract is approved by Procurement, submit new supplier registration information if a new Vendor according to Vendor Registration Policy.

Procurement Role:

* Review Sole Source Form and determine if acceptable.

* Request cooperative contract, quote from vendor, and any other applicable details.

* Draft contract if applicable.

* If Sole Source is not applicable, request information and prepare Formal Solicitation.

*The Procurement Office has the sole authority in determining the final purchasing method for any item.

* Life of contract/purchase order or repetitive purchases determines the dollar threshold for all types of solicitations.