

BOISE STATE UNIVERSITY PROCUREMENT PROCESS QUICK REFERENCE

Policy: Orders or commitments by faculty or staff are not binding on the University unless supported by a valid purchase order (PO), an approved contract**, or the authorized use of an institutional procurement card (P-card).

- 1) Idaho Code 67-9225(2): Boise State is required to utilize the State of Idaho open [contracts](#). Contracts cover a wide range of goods and services, updated often.
- 2) All purchases of goods and services shall incorporate [Boise State University Standard Contract Terms and Conditions](#) (dated 2/2018). **Sponsored Projects funded purchases may require supplemental terms and conditions.** Any agreements or contracts should be completed in accordance with guidelines provided by [OGC](#).
- 3) New software purchases and all software renewals must be submitted to OIT PMO for review by submitting a [Software Accessibility Review Board \(SARB\) request](#).
- 4) Certificates of Insurance shall be required if vendor is performing services at a Boise State property, providing transportation/charter services (bus or air) or has signed University Contract for Services. [Risk Management Certificates of Insurance Requirements](#)
- 5) Trade-in of tagged/capitalized equipment requires a [Request for Disposal of Excess Inventory Items](#) form to be filled out prior to equipment being traded in.

SPONSORED PROJECT purchases of goods, services, software (IT), and Hotel/Lodging/Conferences:

- **Federal funded grants, flow-through, cost sharing or contracts - see [Federal Funds Purchasing Procedure](#).**
- **Sponsored project procurement may require specialized processes and contract terms. Contact Procurement to discuss or email questions to P2P_Procurement@boisestate.edu**

Purchases of Goods or Services < \$10,000 - typically do not require a bid			
Activity	Required Forms / Documents	Timing	Comments
Purchase of Goods and Services ≥ \$2,999	-OGC Contract Review and/or SARB approval if applicable; Receipts supporting P-Card transactions need to be kept with the cardholder statements.	N/A	-P-Card is preferred payment method for small \$ purchases as outlined in Purchasing and P-card Policy. PO can be issued if vendor does not accept p-card. - P-Card is not allowed for payments to foreign vendors due to potential IRS withholding unless approved by Tax Reporting. Contact Tax Reporting Dept for instructions . - P-Card purchases for services for Independent Contractors shall follow the IC Checklist . - Sponsored Projects for Hotel/Lodging/Conferences for groups requires Standard Requisition, regardless of dollar amount. See Job Aid
Purchase of Goods and Services ≥ \$2,999-\$9,999	-Standard Requisition submitted in Oracle Financials Cloud (OFC). See Job Aid ** -At least one Vendor Quote required. Prudent business practices suggest obtaining several comparison quotes. -If trade-in, attach Request for Disposal of Excess Inventory Items and OSP approval, if applicable -OGC Contract Review and/or SARB approval, if applicable	~3 days If Contract Requires Legal Review , allow adequate time for contract review and negotiation	-Services from Independent Contractor require completion of the Independent Contractor Classification Request . IC specialist will review and provide further instructions -Trade-in approval required from Procurement and Vendor Services Director before PO is issued -May take longer if Substitute W9 and Direct Deposit form needed to set up new vendor in OFC -Further delays if vendor rejects Boise State University Standard Contract Terms and Conditions and/or Boise State University Sponsored Projects Supplemental Terms and Conditions. -Procurement will issue a purchase order

Purchases of Goods or Services \$10,000 - \$249,999 - typically require an informal bid process using Request for Quote (RFQ). Sponsored Projects using federal funds, flow-through, cost sharing or contracts - see [Federal Funds Purchasing Procedure](#).

Activity	Required Forms / Documents	Timing	Comments
Purchases of Goods or Services ≥ \$9,999 - \$249,999	-Standard Requisition submitted in Oracle Financials Cloud (OFC). See Job Aid ** -If trade-in, attach Request for Disposal of Excess Inventory Items -Informal bid required. ** Quotes from 3 vendors meeting requirements - attach if you have them; otherwise Procurement will solicit for quotes. -OGC Contract Review and/or SARB approval, if applicable	~4-8 weeks If Contract Requires Legal Review , allow adequate time for OGC review; min. 3 weeks	-Timing depends on how detailed specifications are, complexity of the purchase, bandwidth of Procurement team, and # of requisitions in Procurement queue preceding your approved requisition. -Trade-in approval required from University Procurement Director before solicitation can be posted -May take longer if Substitute W9 and Direct Deposit form needed to set up new vendor in OFC. -Further delays if vendor rejects Boise State University Standard Contract Terms and Conditions and/or Boise State University Sponsored Projects Supplemental Terms and Conditions. -Procurement will issue a purchase order.

Purchase of Goods or Services ≥\$250,000 - typically require a bid process using Invitation to Bid (ITB) / Request For Proposal (RFP). Sponsored Projects using federal funds, flow-through, cost sharing or contracts - see [Federal Funds Purchasing Procedure](#).

Activity	Required Forms / Documents	Timing	Comments
Specification development / document review	N/A	Varies greatly and not figured into timetable below	-Involve Procurement early, even before requisition/funding settled so correct forms and procedures can be implemented at the appropriate time. ~More complex bidding situations will take longer
Invitation To Bid (ITB) or Request For Proposal (RFP) Bid document development / evaluation criteria	~Standard Requisition submitted in Oracle Financials Cloud (OFC). See Job Aid ** -If trade-in, attach Request for Disposal of Excess Inventory Items ~Potential vendor list	~2-4 weeks	-Timing depends on Procurement workload -Trade-in approval required from University Procurement Director before solicitations can be posted
Open solicitation period Vendor Q & A period and/or pre-bid/preproposal conference. Solicitation responses received/opened/reviewed by Procurement Responses sent to end user	N/A	~2-4 weeks depending on complexity	-May extend close date if there are extensive questions. The close date must be 11 working days after issuance date of last amendment.
Response evaluation by University evaluation committee; Scores sent to Procurement for tabbing; cost points added and apparent winner determined	N/A	2-4 weeks	-Timing will depend on complexity of evaluation criteria and availability of evaluation committee members ~SARB approval, if applicable
Letter Of Intent (LOI) to award notification sent to all vendors	N/A	1-2 weeks	-End user approval of apparent winner is required in writing prior to issuing Intent to Award letter. -Intent to Award period requires 5 full working day period in which vendors not receiving the award may appeal; remaining time is for processing on either end of LOI.
Issue PO	N/A	1 week	-PO award can be delayed if: - appeal received during LOI period - terms and conditions must be negotiated with the winning vendor
Approximate Timetable Total		8-20 weeks	~Does not count initial specification development/document review period or time for demonstrations, if required.

Scientific Research Equipment or Sole-Source bid exemption justification ≥ \$10,000 must be approved by University Procurement Director. Research Equipment bid exemption is not allowed on Sponsored Projects purchases using federal funds, flow-through, cost sharing or contracts - see [Federal Funds Purchasing Procedure](#).

Activity	Required Forms / Documents	Timing	Comments
Sole-Source or Scientific Research Equipment	~Standard Requisition submitted in Oracle Financials Cloud (OFC). See Job Aid ** ~Sole-Source Justification form or Justification for Bidding Exemption of Scientific Equipment for Research form -If trade-in, attach Request for Disposal of Excess Inventory Items and OSP approval, if applicable ~Vendor Quote ~OGC Contracts or SARB approval, if applicable	2-3 weeks Allow adequate time for OGC vendor document review - min. 3 weeks	~Sole Source: Procurement Director reviews justification. If approved, Procurement posts the required legal notice on Procurement and Vendor Services website. There is a 5 full working day period after notice is posted for potential appeals. ~Research Exemption: Procurement Director reviews justification. If approved Procurement will work with the vendor to finalize the purchase. ~May take longer if Substitute W9 and Direct Deposit form is needed to set up new supplier in OFC. ~Issuing PO may be delayed if vendor does not accept Boise State University Standard Terms and Conditions NOTE: If Procurement Director determines that the bid exemption is not valid OR if sole source is appealed, the applicable RFQ/ITB/RFP process begins

Additional bid exemptions available per [University Purchasing Policy 6130, Section V](#) - contact Procurement to discuss potential use and applicable process

***An approved contract is one that has been signed by an individual with an appropriate level of signing authority as established by the VPFA's office and has been reviewed through the [Office of the General Counsel](#) or written using the University-approved [Contract for Services form](#). ALL contracts for services or goods (regardless of the \$ amount) that reference vendor terms and conditions MUST be reviewed/approved by Office of the General Counsel.

- NOTE: the following have not been included in the timetable above:**
- (1) State Board of Education (SBOE) Exec. Director approval on purchases/contracts ≥ \$500,000 takes 1-3 wks. (requested after solicitation evaluation is complete, or sole-source/other bid exemption is approved by Procurement Director);
 - (2) SBOE approval on purchases/contracts ≥ \$1,000,000 (agenda item, approval required before bid/proposal award; usually done after vendor t&c negotiations finalized with OGC), time frame depends on SBOE meeting; schedule. Agenda materials due to VPCFO Office approximately 7-9 weeks prior to SBOE meeting. Actual schedule is available on VPFA website.
 - (3) Vendor demos after initial solicitation evaluation complete