

BOISE STATE UNIVERSITY PURCHASING 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 such as computers, multi-function copier equipment, short-term vehicle rental, lab supplies, IT resources and more.
- 2) All purchases of goods and services will incorporate [Boise State University Standard Terms and Conditions](#). Use of alternative terms (vendor terms, license agreements and/or other vendor documents) must be routed to the [Office of the General Counsel](#) (OGC) for review prior to signature. Allow adequate time for OGC review.
- 3) New software purchases require the approval of [OIT System Architecture Review Board \(SARB\)](#)
- 4) Certificates of Insurance will be required if supplier is working on campus
- 5) Trade-in of a grant-funded asset, must be reviewed by OSP (required by OSP to ensure terms of original grant are satisfied).

**** Purchases using federal funds may require specialized purchasing processes and contract terms. Contact Purchasing to discuss**

Purchases of Goods or Services < \$10,000 - typically do not require a bid			
Activity	Required Forms / Documents	Timing	Comments
Purchase of Goods and Services ≤ \$1,999	~Contracts 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 more detail ~P-Card purchases are not allowed from Independent Contractors
Purchase of Goods and Services \$2,000-\$9,999	~ Purchasing Requisition submitted in Oracle Fusion 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, Salvage or Trade-In Inventory Items and OSP approval, if applicable ~SARB approval, if applicable	3 days Allow adequate time for OGC vendor document review	~Services from Independent Contractor - do not submit purchasing requisition. Complete Independent Contractor Classification Checklist and email to Accounts-payable@boisestate.edu . AP will provide further instructions ~Trade-in approval required from Purchasing Director before po is issued ~May take longer if Vendor Information Form needed to set up new vendor in OFC ~Will take longer if vendor won't accept Boise State University Standard Terms and Conditions ~Purchasing will issue a purchase order

Purchases of Goods or Services \$10,000 - \$100,000 - typically require an informal bid process using Request for Quote (RFQ)			
Activity	Required Forms / Documents	Timing	Comments
Purchases of Goods or Services \$10,000 - \$99,999	~ Purchasing Requisition submitted in Oracle Fusion Cloud (OFC) . See Job Aid . ** ~If trade-in, attach Request for Disposal of Excess, Salvage or Trade-In Inventory Items and OSP approval, if applicable ~Informal bid required. ** Quotes from 3 Idaho vendors meet this requirement - attach if you have them; otherwise Purchasing will issue a Request for Quote (RFQ) ~SARB approval, if applicable	4-8 weeks Allow adequate time for OGC vendor document review; min. 3 wks	~Timing depends on how complete the specifications are, complexity of the purchase and # of active bids in Purchasing queue ~Trade-in approval required from University Purchasing Director before bid can be posted ~May take longer if Vendor Information Form needed to set up new vendor in OFC. ~Will take longer if vendor won't accept Boise State University Standard Terms and Conditions ~Purchasing will issue a purchase order.

Purchase of Goods or Services >\$100,000 - typically require a bid process using Invitation To Bid (ITB) / Request For Proposal (RFP)			
Activity	Required Forms / Documents	Timing	Comments
Specification development / document review	N/A	varies greatly and not figured into timetable below	~Involve Purchasing 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	~ Purchasing Requisition submitted in Oracle Fusion Cloud (OFC) . See Job Aid . ** ~If trade-in, attach Request For Disposal of Excess, Salvage or Trade-In Inventory Items and OSP approval, if applicable ~Potential vendor list	2-4 weeks	~Timing depends on # of active bids in Purchasing queue ~Trade-in approval required from University Purchasing Director before bid can be posted
Open bid period bidder Q & A period and/or prebid conference bid responses received/opened by Purchasing 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.
Bid evaluation by University evaluation committee committee; Scores sent to Purchasing 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 bidders	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 supplier
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 Purchasing Director			
Activity	Required Forms / Documents	Timing	Comments
Sole-Source or Scientific Research Equipment	~ Purchasing Requisition submitted in Oracle Fusion 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, Salvage or Trade-In Inventory Items and OSP approval, if applicable ~ Vendor Quote ~SARB approval, if applicable	2-3 weeks Allow adequate time for OGC vendor document review - min. 3 wks	~ Sole Source: Purchasing Director reviews justification. If approved, Purchasing posts the required legal notice on Purchasing website. There is a 5 full working day period after notice is posted for potential appeals. ~ Research Exemption: Purchasing Director reviews justification. If approved Purchasing will work with the supplier to finalize the purchase. ~May take longer if Vendor Information Form needed to set up new vendor in OFC. ~Issuing PO may be delayed if supplier does not accept Boise State University Standard Terms and Conditions NOTE: If Purchasing 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 Purchasing to discuss 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 bid evaluation is complete, or sole-source/other bid exemption is approved by Purchasing Director);
- (2) SBOE approval on purchases/contracts ≥ \$1,000,000 (agenda item, approval required before bid award; usually done concurrently with bid), time frame depends on SBOE meeting; schedule. Agenda materials due 3-4 weeks prior to SBOE meeting.
- (3) Vendor demos after bid evaluation complete