

**Form Purpose:** To comply with University Purchasing Policy and Federal Acquisition Regulation (FAR), completion of this form is required for all purchasing card and purchase order (PO) transactions between \$3,001 and \$149,999.99 USD with a non-preferred supplier. All purchases \$150,000 USD and above, regardless of the source of funds or type of supplier utilized, require completion of this form.

This form must be submitted along with all supporting documentation via the document attachment functionality in Oracle, upon completion of a PO or scanned and attached to the purchasing card verification report (PRC). POs or PRCs without a completed required Purchasing Checklist and Bid Summary Form attached may be rejected during the PO approval process and sent back for reprocessing.

Purchase Order Number (or type "PCard"): \_\_\_\_\_

Federal Government Funds? \_\_\_\_\_ Other Sponsored Funds? \_\_\_\_\_

If federal funds, is it an individual federally funded asset costing  $\geq$ \$100,000 USD? \_\_\_\_\_

If **yes**, complete an [Equipment Screening Report](#).

Is a contract required? \_\_\_\_\_ If yes, has the UCO granted a contract? \_\_\_\_\_

If the UCO granted a contract, provide contract reference: \_\_\_\_\_

**A. Description of Goods and Services**

Describe the goods and/or services to be procured:

**B. Competitive Quotations/Proposals**

List a minimum of two competitive quotations/proposals solicited and received, including the awarded supplier/consultant. Use the left column to indicate the supplier chosen. Attach copies of quotes/proposals received.

	Supplier Name	Currency	Price of Items/ Services + Lot/Other Chargers	Shipping Costs + FOB Point	Payment and/or Discount Terms	Total Order Price
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						

### C. Selection Criteria

Select the criteria used to choose the awarded supplier/consultant:

- Supplier was the low bidder.
- Supplier provided the best evaluated responsible offer (other than low bidder) - provide evaluation criteria \*
- Supplier establishes or maintains an essential engineering, research, or development capability (single source) \*
- Compatibility with other components of a system already in operation - identify existing items (single source) \*
- Only supplier that meets pre-established performance characteristics - provide listing (single source) \*
- Supplier specifically identified within award documentation - provide verification (single source) \*
- Supplier/consultant is the only manufacturer/provider of this good or service (sole source) \*
- Other: \* \_\_\_\_\_

\* Requires explanation (attach any supporting documentation):

### D. Price/Cost Analysis Criteria

Select the criteria used for the Price/Cost Analysis (Reference [Methods to Determine Price Reasonableness \[.pdf\]](#) for definitions):

- Adequate price competition
- Comparison to in-house estimate \*
- Comparable to price sold to federal government \*
- Award specifically identifies item/person and price (provide identifying page from award) \*
- Catalog/market pricing \*
- Comparable customer's invoice \*
- Historical price (provide previous PO number) \*
- Comparison to similar items: \*

\* Requires explanation/summary of analysis (attach any supporting documentation):

### E. Budget Information (Required For Orders \$1 Million or Greater)

Project	Approved Budget	Approved Amount Committed	Amount to be Committed in this Request	Total Commitments (Approved and Pending)	Budget Variance

Notes:

## F. Additional Threshold Requirements

(See the [CMU Buyer Actions Matrix and Guide \[.pdf\]](#) for more information.)

### ≥\$150,000 USD: Contract Cost and Price Analysis

Cost or price analysis must be performed and documented on all procurement actions where federal funds are ≥150,000 USD including contract modifications. Independent estimates must be created prior to receiving bids or proposals.

### Small Business/Diversity Consideration

If federal funds are used and the order is over \$150,000 USD, FAR Part 19.702 requires that certain types of small businesses listed below shall have the maximum practicable opportunity to participate in contract performance consistent with its efficient performance. This consideration is strongly encouraged by the university regardless of the fund source(s).

Were any of the following types of small businesses solicited (check all that apply):

- HUBZone                                       Veteran-Owned                                       Alaskan Native Corp Owned  
 Small Business Concern                       Service Disabled Veteran Owned                       HBCU/MI  
 Disadvantaged Minority:

- |  |  |                                      |
|--|--|--------------------------------------|
| <input type="checkbox"/> Black American    | <input type="checkbox"/> Asian American  | <input type="checkbox"/> Women Owned |
| <input type="checkbox"/> Hispanic American | <input type="checkbox"/> Native American |                                      |

If solicited and not chosen, or not solicited, explain why not:

≥\$650,000 USD Federal Funds - **Small Business Subcontracting Plan** required? \_\_\_\_\_

If **yes**, was it obtained, approved, and incorporated into the PO? \_\_\_\_\_

≥\$700,000 USD Federal Funds - **Certificate of Current Cost or Pricing** required? \_\_\_\_\_

If **yes**, was it obtained? \_\_\_\_\_

\_\_\_\_\_  
Name of person submitting this document

\_\_\_\_\_  
Department Name

\_\_\_\_\_  
Phone Number

\_\_\_\_\_  
Date

Scan and attach completed form to a PO or PRC  
in the Oracle Financial System.