LOYOLA UNIVERSITY CHICAGO PROCUREMENT SERVICES

PROCUREMENT ACTION MATRIX

This Matrix is intended to provide University Buyers with guidance on the documentation and approvals required for various purchases.

		\$0 - \$4,999	\$5,000 - \$24,999	\$25,000 - \$149,999	\$150,000 - \$649,999	\$650,000 and OVER	
		SPA Review (For relevant Funding Sources)					
		<u>Vendor Questionnaire (Form W-8 or Substitute</u>	W-9 Form) - for new vendors upon setup				
		Worker's Classification Review (For Independe	, , ,				
			Award Flow-down Requirement (Federal Funds	Only)			
ids:	되		(Purchasing Department Involvement			
Fun	plie			Purchasing Department Approval			
ed	Idne			Formal Quote From Vendor			
<u>rard</u>	Pre-Qualified Supplier			Capital Budget Request Form			
Aw					Purchasing Checklist		
ally					Establishment of Competition (3 written quotes	/proposals)	
Externally Awarded Funds:					Controlled Bid Process (e.g., \$150-250k: RFI/Q;	Greater than \$250k: RFP)	
	-1				Source Justification		
					Price Reasonableness/Cost Analysis		
					Screening Certificate		
						SDBC, SWB, Vet & HUB Zone Consideration	
		SPA Review (For relevant Funding Sources)					
		Vendor Questionnaire (Form W-8 or Substitute W-9 Form) - for new vendors upon setup					
		Worker's Classification Review (For Independent Contractors Only)					
			Purchasing Checklist				
6	Establishment of Competition (3 written quotes/proposals)						
nd	plie		Purchasing Department Approval				
1 Fu	Sup		Formal Quote from Vendor				
<u>rdec</u>	ied		Source Justification				
wai	alif		Price Reasonableness/Cost Analysis				
ly A	ġ		University General Terms and Conditions				
Externally Awarded Funds:	Non-Pre-Qualified Supplier		Award Flow-down Requirement (Federal Funds				
xtei	-uo			Purchasing Department Involvement			
Щ	Z			Controlled Bid Process (e.g., \$150-250k: RFI/Q			
				Supplier Conflict of Interest and Compliance C	ertification Form		
				Capital Budget Request Form	Same Cartificate		
					Screening Certificate		

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For procurement activity relating to Operating, Gift, Endowment or Capital Funds, the below Matrix is intended for the acquisition of goods and materials and supplies only, NOT SERVICES

_	SPA Review (For Series 2XXXXX Accounting Units)				
Operating, Gift, Endowment or Capital Pre-Qualified Supplier	Vendor Questionnaire (Form W-8 or Substitute W-9 Form) - for new vendors upon setup				
CaJ		Formal Quote From Vendor			
t or ier		Capital Budget Request Form			
ppl			Purchasing Department Involvement		
wn I Su			Purchasing Department Approval		
ndc fied			Purchasing Checklist		
t, E uali			Establishment of Competition (3 written quotes/proposals)		
ıg, Gift, Endowment ol Pre-Qualified Supplier			Controlled Bid Process (e.g., \$150-250k: RFI/Q; Greater than \$250k: RFP)		
P _{re}			Source Justification		
rati			Price Reasonableness/Cost Analysis		
Dpe			University General Terms and Conditions		
\cup			SDBC, SWB, Vet & HUB Zone Consideration		
tal	SPA Review (For Series 2XXXXX Accounting Units)				
apit	or Questionnaire (Form W-8 or Substitute W-9 Form) - for new vendors upon setup				
r C lier	Purchasing Checklist				
nt o	Establishment of Competition (3 written quot	es/proposals)			
mei d Su	Purchasing Department Approval				
iting, Gift, Endowment or C. Non-Pre-Qualified Supplier	Formal Quote from Vendor				
End	Source Justification				
ift,] e-Q	Price Reasonableness/Cost Analysis				
-Pr	University General Terms and Conditions				
ting Non		Purchasing Department Involvement			
Operating, Gift, Endowment or Capital Non-Pre-Qualified Supplier		Capital Budget Request Form			
Op			Controlled Bid Process (e.g., \$150-250k: RFI/Q; Greater than \$250k: RFP)		
			SDBC, SWB, Vet & HUB Zone Consideration		