

PROCUREMENT- IN-A-PAGE

10/11/2007

Purpose of matrix: To provide guidance on the process and forms required for the procurement of all goods and services. All procurements over \$2,500 shall be initiated using GW's purchase requisition process through Oracle (eas.gwu.edu). For ease of submission, documents requiring prior approval can be attached during this process indicated in the attached guidance document. See: <http://eas.gwu.edu/home/support/documentation/documentation.cfm>. Subawards are not considered procurements but are referenced herein to provide guidance associated with the different documentation requirements. This matrix applies to procurements for sponsored projects only. The Bids, Quotations, and Named Source Justification policy can be referenced for additional guidance <http://my.gwu.edu/files/policies/Bids,Quotes,SoleSourceFINAL.pdf>. Refer to this link for the OCRO Handbook references below: <http://www.gwu.edu/~research/handbook/index.htm> . **IMPORTANT: NO PROCUREMENTS OF GOODS OR SERVICES SHALL BE MADE UNLESS DOCUMENTED IN PROPOSAL BUDGET AND APPROVED BY SPONSOR OR WITHIN SPONSORS RE-BUDGETING GUIDELINES.**

| <i>Dollar Thresholds ></i> | <u>A</u> < \$2,500.00 | <u>B</u> \$2,501 < \$24,999 | <u>C</u> \$25,000 < \$100,000 | <u>D</u> >\$100,000 |
|---|---|---|--|---|
| Goods: | | | | |
| Small Dollar Purchases See SCO's website and OCRO Handbook, Section 15.6 | 1. Use SCO's Small Purchase rules (P-Card, Quick Pay, Purchase Requisition). 2. Quotes & Selection of Source form not required. 3. Can't circumvent threshold with multiple purchases. 4. Monthly post facto review of purchases greater than \$100 | | | |
| Equipment See Bids, Quotations, and Named Source Justification Policy See Handbook, Sections 15.2 and 15.3 | | 1. Provide Supply Chain "Selection of Source" form with requested back-up. http://www.gwu.edu/~supchn/forms.htm 2. Supplier registration for new vendors. http://www.gwu.edu/~supchn/forms.htm | Same as Column B | Same as Column B plus Inform MDRSO and SCO in advance |
| Services: | | | | |
| Independent Contractor (Individual) See Handbook Section 15.4 | 1. Request for ICA form (PI completes and submits to RSC) 2. Supplier registration form for new suppliers only, including W-9, see: http://www.gwu.edu/~supchn/forms.htm 3. Twenty Factors Test (required for all individuals), see: http://www.gwu.edu/~supchn/forms.htm 4. CV/Resume of Individual | 1. Same as Column A plus: 2. Selection of Source Form http://www.gwu.edu/~supchn/forms.htm | Same as Column B | Same as Column B plus Inform MDRSO and SCO in advance |
| Independent Contractor (Commercial) See Handbook Sections 15.4 | 1. Request for ICA form (PI completes and submits to RSC) 2. Supplier registration form for new suppliers only, see: http://www.gwu.edu/~supchn/forms.htm | 1. Same as Column A plus: 2. Selection of Source Form http://www.gwu.edu/~supchn/forms.htm | Same as Column B | Same as Column B plus Inform MDRSO and SCO in advance |
| Subcontracts: (Use when issuing a subcontract when the prime award is a contract) | 1. Supplier registration form for new suppliers only, see: http://www.gwu.edu/~supchn/forms.htm | 1. Same as Column A plus: 2. Selection of Source Form http://www.gwu.edu/~supchn/forms.htm | Same as Column B | Same as Column B plus Inform MDRSO and SCO in advance |
| Subawards: | | | | |
| Subawards (financial assistance awards) See Handbook Section 15.5 | Regardless of the dollar amount 1. Certification of Subaward Memo (Completed by RSC and attached in EAS) 2. Supplier Registration if new supplier http://www.gwu.edu/~supchn/forms.htm | | | |