Must a formal contract or agreement be signed as part of the Purchase?

No

There is no formal contract or agreement.
Proceed with the purchase using either a Small Purchase, the Purchase Card, or the purchase Requisition process.

Yes

The Department is not purchasing Goods or Services, but a formal contract or agreement is needed (i.e. revenue generating project). Please submit the documentation to Purchasing for review & approval.

Routine Purchase of Goods or Services
Enter requisitions and obtain electronic approvals. If Small Purchase or Purchase Card is used, complete the appropriate process. Do not place order until contract is signed.

The following areas do not fall under Purchasing guidelines/authority.

- Property - Please Contact Real Estate Office
- Sponsored Programs
- Construction - Please Contact Facilities Planning & Design or Construction Mgmt.
- Technology Transfer (OTT)
- Human Resources
- Academic contracts not involving purchases of goods or services

Administrative Services
Must use either the competitive bid process or sole source justification.

How to Write a Sole Source Justification

Complete the Checklist for Determination of Independent Contractor Status.
Controller’s Office (Employee or Independent Contractor?)
Use a Standard Pre-approved Contract if possible.
Forward to Purchasing.

Personal Services
e.g. Lawyer, Doctor, Teacher, Engineer, etc.

Does not require competitive bid, however it is recommended whenever possible.

Waiver of Competitive Bidding

How to Write a Sole Source Justification

Purchasing will review the contract, modify if appropriate, and return the signed contract to the department. If vendor does not agree to changes it may be possible for the Department to sign the [contract advisory], which places assumption of liability directly on the Department. Contract negotiations may be required between/among end-user, contractor, Contract Management, and Office of Legal Affairs.

Following signature, the contract will be distributed and filed.