

PURCHASE ORDER FLOWCHART - MATRIX - (Revised - 12.01.23)

Purchase Type	Requisition Required and Received by Buyer (before proceeding)	Submit PO CR (Purchase Order Change Request to Procurement - Attach to Contract Request)	Three (3) Quotes/ Proposals Required	Formal Competitive Bid or RFP Required (Finalize Specs/SOW)	MWBE Goal Setting Participation - Stakeholder will Submit Form(s) to MWBE Office for Weekly Agenda	Buyer Submits PAF (Procurement Advisory Form) to Stakeholder	Evaluation of Bid/RFP for Recommended Award	Buyer Creates and Releases PO (No Contract/No Board Approval Required)	Stakeholder Submits Contract Request w/PAF	Buyer Submits Contract Request	Execution of Contract (Board Approval NOT Required)	Board Approval Required	Stakeholder Submits Supporting Docs to Buyer for Board Approval	Stakeholder Submits Supporting Docs with Contract Request for Board Approval	Legal will Place on the Board Agenda for Board Approval	Procurement will Place on the Board Agenda for Approval	Execution of Contract (After Board Approval)	PO Created and Released After Executed Contract Received	PO Created and Released After Board Approval
New Purchase \$3,500 or less (goods/services) (Requisition Not Required)	NO																		
New Purchase over \$3,500 - \$24,999 (goods) [Exception: Procurement Contract in Place - No Quotes Required (ex., office supplies, computers, etc.)]	x		x					x											
New Purchase over \$3,500 - \$24,999 (services)	x		x			x			x		only if it is not a multi-year term	if it is a multi-year term		if it is a multi-year term	if it is a multi-year term		if it is a multi-year term	x	
New Purchase over \$25,000 (goods) [Exception: Procurement Contract in Place - No Bid Required (ex., office supplies, computers, etc.)]	x			Bid Required	Purchase of \$100,000 or more		x	Purchase under \$100,000				Purchase of \$100,000 or more	Purchase of \$100,000 or more			Purchase of \$100,000 or more			Purchase of \$100,000 or more
New Purchase over \$25,000 (services)	x			RFP Required	Purchase of \$100,000 or more		x		x		Purchase under \$100,000 and if it is not a multi-year term	Purchase of \$100,000 or more/ or a multi-year term	Purchase of \$100,000 or more -- or a multi-year term			Purchase of \$100,000 or more -- or a multi-year term	Purchase of \$100,000 or more -- or a multi-year term	x	
Approved Cooperative Agreement, Piggyback, or Sole/Single Source (goods only) under \$100,000	x							x											
Approved Cooperative Agreement, Piggyback, or Sole/Single Source (goods only) \$100,000 or more	x											x	x			x			x
Approved Cooperative Agreement, Piggyback, or Sole/Single Source (services) under \$100,000	x								x	x	x	if it is a multi-year term	if it is a multi-year term			if it is a multi-year term	if it is a multi-year term	x	
Approved Cooperative Agreement, Piggyback, Sole/Single Source (services) \$100,000 or more	x								x			x	x			x	x	x	
Renewal -Existing Contract (under \$100,000)	x					x			x		x	if it is a multi-year term		if it is a multi-year term	if it is a multi-year term		if it is a multi-year term	x	
Renewal -Existing Contract (\$100,000 or more)	x					x			x			x		x	x		x	x	
Professional Services - Per Policy #2013 (under \$75,000)	x					x			x		only if it is not a multi-year term	if it is a multi-year term		if it is a multi-year term	if it is a multi-year term		if it is a multi-year term	x	if it is a multi-year term
Professional Services - Per Policy #2013 (\$75,000 or more)	x					x			x			x		x	x	x	x	x	
Contract Amendment (under \$100,000) (Professional Services under \$75,000)		x							PAF required from Procurement - attach PO CR		only if it is not a multi-year term	if it is a multi-year term		if it is a multi-year term	if it is a multi-year term		if it is a multi-year term	x	
Contract Amendment (\$100,000 or more) (Professional Services \$75,000 or more)		x							PAF required from Procurement - attach PO CR			x		x	x		x	x	
Purchase Order Change (goods)		send to PS only										if \$100K or more	if \$100K or more			if \$100K or more			if \$100K or more