



LOYOLA UNIVERSITY CHICAGO BUYER ACTIONS MATRIX

Actions Required when Spending Externally Awarded Funds

Preparing people to lead extraordinary lives

PRE-QUALIFIED SUPPLIER	SPA Review	Establishment of Competition	PD Involvement	PD Approval Required	Quote / Proposal Required	Controlled Bid Process	Source Justification	Award Flowdown Requirement	Screening Certificate	Certifications Required	Price/Cost Analysis	SDBC, SWB, Vet & HUBZone Consideration	University General Ts&Cs Incorporation	Pricing Verification
									Fed Only	Fed Only				
\$0 - \$4,999	Yes	No	No	No	No	No	No	No	No	No	No	No	No	No
\$5,000 - \$24,999 @	Yes	No	No	No	No	No	No	Yes	No	No	No	No	No	Yes
\$25,000 - \$149,999	Yes	No *	TBD *	No	Oral /Written +	No	No	Yes	No	No	No	No	No	Yes
\$150,000 - \$649,999	Yes	Yes	Yes	Yes	Written	Yes	Yes	Yes	Yes	No	TBD	No	No	Purch. Checklist
\$650,000 & over	Yes	Yes	Yes	Yes	Written	Yes	Yes	Yes	Yes	No	TBD	Yes *	No	Purch. Checklist
@ Only Lawson POs can be used to make commitments of \$5,000 or more with Pre-Qualified Suppliers using award funds.. * Over \$50,000, competition may be established at University discretion * Over \$50,000, PD involvement if competition is established + Notes and/or emails up to \$30K. Formal written document at \$30K or greater. * If federal non-competitive, non-commercial item, with no price analysis * Formal Plan if federally funded award														
TBD = To Be Determined with PD Assistance														

NON PRE-QUALIFIED SUPPLIER	SPA Review	Establishment of Competition	PD Involvement	PD Approval Required	Quote / Proposal Required	Controlled Bid Process	Source Justification	Award Flowdown Requirement	Screening Certificate	Certifications Required	Price/Cost Analysis	SDBC, SWB, Vet & HUBZone Consideration	University General Ts&Cs Incorporation	Pricing Checklist & Bid Summary
									Fed Only	Fed Only				
\$0 - \$4,999	Yes	No	No	No	No	No	No	No	No	No	No	No	No	No
\$5,000 - \$24,999 @	Yes	Yes	No	Yes	Oral	No	Yes *	Yes	No	No	Price	No	Yes	Yes
\$25,000 - \$149,999	Yes	Yes	Yes	Yes	Oral /Written +	Yes	Yes *	Yes	No	Yes#/No	Price	No	Yes	Yes
\$150,000 - \$649,999	Yes	Yes	Yes	Yes	Written	Yes	Yes *	Yes	Yes	Yes #+/ No	Price	No	Yes	Yes
\$650,000 & over	Yes	Yes	Yes	Yes	Written	Yes	Yes *	Yes	Yes	Yes #+/ No	Price	Yes *	Yes	Yes
@ Only Lawson POs can be used to make commitments of \$5,000 or more with non- Pre-Qualified Suppliers using award funds. + Notes and/or emails up to \$30K. Formal written document at \$30K or greater. * If Non-competitive or not awarded to low bidder. # Debarment only at \$30K or >. + Byrd & Debarment. o Cost & Pricing Data Certification if doesn't meet FAR exemptions. * If federal funds, non-competitive, non-commercial item, with no price analysis * Formal Plan if federally funded award														



LOYOLA UNIVERSITY CHICAGO BUYER ACTIONS MATRIX

Actions Required when Spending University Funds

(i.e., Operating Funds, Gift Funds, Endowment Funds, Capital Funds)
This is for acquisition of goods, materials and supplies only, not services

Preparing people to lead extraordinary lives

PRE-QUALIFIED SUPPLIER	SPA Review	Establishment of Competition	PD Involvement	PD Approval Required	Quote / Proposal Required	Controlled Bid Process	Source Justification	Award Flowdown Requirement	Screening Certificate	Certifications Required	Price/Cost Analysis	SDBC, SWB, Vet & HUBZone Consideration	University General Ts&Cs Incorporation	Pricing Verification
\$0 - \$149,999	* N/A	No	No	No	Oral /Written +	No	No	N/A	No	No	No	No	No	Yes
\$150,000 & over	* N/A	Yes	Yes	Yes	Yes	Yes	Yes	N/A	No	No	Yes	Yes	Yes	Purch. Checklist
	* Series 2XXXXX Accounting Units Required				+ Notes and/or emails up to \$30K. Formal written document at \$30K or greater.									
TBD = To Be Determined with PD Assistance														

NON PRE-QUALIFIED SUPPLIER	SPA Review	Establishment of Competition	PD Involvement	PD Approval Required	Quote / Proposal Required	Controlled Bid Process	Source Justification	Award Flowdown Requirement	Screening Certificate	Certifications Required	Price/Cost Analysis	SDBC, SWB, Vet & HUBZone Consideration	University General Ts&Cs Incorporation	Pricing Checklist & Bid Summary
\$0 - \$4,999	* N/A	No	No	No	No	No	No	N/A	No	No	No	No	No	No
\$5,000 - \$24,999	* N/A	Yes	No	Yes	Oral	No	Yes +	N/A	No	No	Price	No	Yes	Yes
\$25,000 - \$149,999	* N/A	Yes	Yes	Yes	Oral /Written +	No	Yes +	N/A	No	No	Price	No	Yes	Yes
\$150,000 & over	* N/A	Yes	Yes	Yes	Yes - Written	Yes	Yes +	N/A	No	No	Price	Yes	Yes	Yes
	* Series 2XXXXX Accounting Units Required				+ Notes and/or emails up to \$30K. Formal written document at \$30K or greater.		+ If Non-competitive or not awarded to low bidder							