



## 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..<br>* Over \$50,000, competition may be established at University discretion<br>* Over \$50,000, PD involvement if competition is established<br>+ Notes and/or emails up to \$30K. Formal written document at \$30K or greater.<br>* If federal non-competitive, non-commercial item, with no price analysis<br>* 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.<br>+ Notes and/or emails up to \$30K. Formal written document at \$30K or greater.<br>* If Non-competitive or not awarded to low bidder.<br># Debarment only at \$30K or >.<br>+ Byrd & Debarment.<br>o Cost & Pricing Data Certification if doesn't meet FAR exemptions.<br>* If federal funds, non-competitive, non-commercial item, with no price analysis<br>* 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

| <b>PRE-QUALIFIED SUPPLIER</b>             | 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 |
|---|---|------------------------------|----------------|----------------------|---|------------------------|----------------------|----------------------------|-----------------------|-------------------------|---------------------|--|--|----------------------|
| <b>\$0 - \$149,999</b>                    | * N/A                                     | No                           | No             | No                   | Oral /Written +   | No                     | No                   | N/A                        | No                    | No                      | No                  | No                                     | No                                     | Yes                  |
| <b>\$150,000 &amp; over</b>               | * 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 |   |                              |                |                      |   |                        |                      |                            |                       |                         |                     |  |  |                      |

| <b>NON PRE-QUALIFIED SUPPLIER</b> | 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 |
|-----------------------------------|---|------------------------------|----------------|----------------------|---|------------------------|---|----------------------------|-----------------------|-------------------------|---------------------|--|--|---------------------------------|
| <b>\$0 - \$4,999</b>              | * N/A                                     | No                           | No             | No                   | No  | No                     | No  | N/A                        | No                    | No                      | No                  | No                                     | No                                     | No                              |
| <b>\$5,000 - \$24,999</b>         | * N/A                                     | Yes                          | No             | Yes                  | Oral  | No                     | Yes +   | N/A                        | No                    | No                      | Price               | No                                     | Yes                                    | Yes                             |
| <b>\$25,000 - \$149,999</b>       | * N/A                                     | Yes                          | Yes            | Yes                  | Oral /Written +   | No                     | Yes +   | N/A                        | No                    | No                      | Price               | No                                     | Yes                                    | Yes                             |
| <b>\$150,000 &amp; over</b>       | * 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 |                            |                       |                         |                     |  |  |                                 |