

## Purpose

To document steps needed to properly review and authorize waivers of competitive bid. The Bid Waiver Process provides Facilities Operations and Development (FOD) employees with detailed process steps.

## Guidelines

The purchase of goods \$25,000 or more and services of \$50,000 or more require competitive bidding. A waiver is an exception to the competitive bid process. There are four rationales for granting a waiver of competitive bidding: Sole Source, Emergency, Economic, Technical & Specialized Consulting Services.

Documents required by OSU Purchasing to process purchase order:

- Printed copy of the approved requisition from the eRequest system
- Completed Request for Waiver of Competitive Bidding form, including appropriate signatures
- Detailed explanation/documentation (justification memo)
- Documentation from the supplier to support waiver rationale (i.e., quote, contract, service agreement)
- Change order requisition, if applicable, to amend an existing purchase order/waiver

Purchases from eStores, consortia agreements or university-side contracts are excluded from this provision.

NOTE – for purposes of this process, Project Manager (PM) refers to Initiator of the request.

## Process

1. Project Manager (PM) will complete the Request for Waiver of Competitive Bidding form found on the OSU Purchasing website (see References below for link). NOTE – The PM does not sign this form (see step 6 below). **Where the form requires Req # / Date, the PM should put the eRequest number (see step 3 below).**
2. PM will prepare a detailed explanation/documentation (justification memo) for the FOD AVP and A&P Senior Director of Finance.
3. PM will complete an eRequest with the dollar amount of the request and route for FOD approval. **A comment should be inserted stating that a Request for Waiver of Competitive Bidding is in process.**
4. PM will give hard copies of all required documents listed above to the Contracts Administrator (CA) in FDC or Admin Associate (AA) in Operations. For FDC projects, the CA will print the project data sheet to be included with the documents.
5. CA or AA will send all documents to FOD Administration for review and signature.
6. FOD AVP will review/approve the waiver request, sign as Initiator, and forward the documents to A&P Shared Services Processing Center for A&P Senior Director of Finance for approval.
7. A&P Senior Director of Finance will review and approve the documents and return to A&P Shared Services Processing Center. NOTE – If rationale is Technical & Specialized Consulting Services, additional information is required as noted on the Request for Waiver of Competitive Bidding form and Instructions (see References below).
8. A&P Shared Services Processing Center will:
  - attach all required documents to the eRequest
  - create the requisition
  - notify the PM and CA or AA that approvals have been obtained
9. The requisition will route to OSU Purchasing for processing.

10. A&P Shared Services Processing Center will notify the PM and CA or AA when the purchase order has been issued.

## **References**

Instructions for Completing a Request for Waiver of Competitive Bidding  
<http://purchasing.osu.edu/FileStore/PDFs/instructionsforwaiver.pdf>

Request for Waiver of Competitive Bidding  
<http://purchasing.osu.edu/FileStore/PDFs/requestforwaiver.pdf>

President's Cabinet Approval Form  
<http://purchasing.osu.edu/FileStore/PDFs/PresidentsCabinetApprovalForm.pdf>