Project: <u>Project Name (eB #)</u>

Design: Excludes design scope requiring stamped/sealed drawings. Design examples include furniture design/selection (ROI, Sedgwick Business Interiors), A/V design, signage design, exhibit design, kitchen design.

Purchasing: Typical capital project examples include furniture, equipment, signage integration, exhibit integration, A/V integration, window treatments, carpet, moving services, etc.

View preferred vendors located here. View types of POs here.

Consultant Selection – Purchase Order (PO): Service < $25k

☐ Select consultant of Team's choice

☐ Develop scope of services, deliverables, schedule

☐ Review scope with key stakeholders

☐ PM submits request to selected Consultant/Vendor

☐ Review formal quotation from Consultant/Vendor

☐ PM sends documentation to Procurement Associate within FCS E&PM

☐ Procurement Assoc. submits KFS requisition to FCS Fiscal Officer for approval

☐ PO (*KFS requisition*) is approved – unless FPAR required

(If PO is part of a larger project =/> $100k OR a study – FPAR may be required)

Consultant Selection – Purchase Order (PO): Service $25k - $50k

☐ PM reviews requested PO with Procurement Agent (*Central Purchasing*)

☐ Meeting w/ key stakeholders – confirm request, process, consultants/vendors

☐ Develop list of **3** (*min. three*) consultants/vendors

☐ Create draft RFP - scope of services, deliverables, schedule

☐ Procurement Agent finalizes RFP and submits to all qualified consultants

☐ Procurement Agent issues any addendum – PM support technical questions

☐ Meeting to review formal quotations with Procurement Agent & stakeholders

☐ Best Value Selection – or provide justification documentation

☐ Procurement Agent completes PO – contract circulates for signatures

(If PO is part of a larger project =/> $100k OR a study – FPAR may be required)

Consultant Selection – Purchase Order (PO): Service > $50k

☐ PM reviews requested PO with Procurement Agent (*Central Purchasing*)

☐ Meeting w/ key stakeholders – confirm request, process, consultants/vendors

☐ Develop list of **5** (min. five) consultants/vendors

☐ Create draft RFP - scope of services, deliverables, schedule

☐ Procurement Agent finalizes RFP and submits to all qualified consultants

☐ Procurement Agent issues any addendum – PM support technical questions

☐ Meeting to review formal quotations with Procurement Agent & stakeholders

☐ Best Value Selection – or provide justification documentation

☐ Procurement Agent completes PO – contract circulates for signatures

(If PO is part of a larger project =/> $100k OR a study – FPAR may be required)