

# Source Selection Worksheet

This worksheet is intended for use when a Requester is intending to purchase a good or service with a cost  $\geq$ \$20,000.

Answer the following questions, beginning with Q1.1, to determine if the good/service you are intending to purchase must go through a source selection process.

Follow the instructions indicated by your response(s).

## Start Here

### Step 1: Source Selection Requirement Determination

QUESTION	NO	YES
<p><b>Q1.1)</b> Is the good/service being paid for with Foundation Funds?</p> <p>IF NO, proceed to Q1.2.</p> <p>IF YES, the purchase is eligible to bypass the source selection process.</p> <p><b>NEXT STEPS</b></p> <ol style="list-style-type: none"> <li>When you are at the point of creating a requisition for your purchase, ensure to attach the approval from the Foundation.</li> </ol>	N	Y
<p><b>Q1.2)</b> Is the good/service an exempt commodity per APLR §19-11-203(14)?</p> <p>See Table A in the Appendix for a list of exempt commodities.</p> <p>IF NO, proceed to Q1.3.</p> <p>IF YES, the purchase is eligible to bypass the source selection process by use of Exemption 19-11-203(14). Enter the Exemption Order here: _____</p> <p><b>NEXT STEPS</b></p> <ol style="list-style-type: none"> <li>When you are at the point of creating a requisition for your purchase, use the Internal Memo field to indicate which exemption you are claiming applies to your purchase. If using exemption EE, read Appendix A for additional instructions.</li> </ol> <p>Enter Internal Memo field text as: Exemption Order 19-11-203(14)(__)</p> <ol style="list-style-type: none"> <li>The Sourcing Buyer confirms the exemption is applicable and processes the Requisition.</li> </ol>	N	Y
<p><b>Q1.3)</b> Is the good/service only available from one source (i.e., one vendor)?</p> <p>IF NO, proceed to Q1.4.</p> <p>IF YES, the purchase is considered a proprietary/sole source procurement and is eligible to bypass the source selection process.</p>	N	Y

NOTE: Proprietary/sole source procurement is uncommon. Service and commodity markets almost always have multiple businesses competing in their respective marketplace. To ensure appropriate use of sole source procurement, there is a justification and approval process.

**NEXT STEPS**

1. Download the [Sole Source Justification Form](#).
2. Follow the form instructions to get the form approved and signed.
3. When you are at the point of creating a requisition, use the Internal Memo field to indicate Sole Source and attach the completed (i.e., signed) Sole Source Justification form.
4. The Sourcing Buyer confirms Sole Source is approved and processes the Requisition.

**Q1.4)** Is the good/service being purchased from a mandatory supplier for the good/service (i.e., good/service is under state contract)?

N

Y

IF NO, proceed to Q1.5.

IF YES, the purchase is utilizing a mandatory state contract and is eligible to bypass the source selection process.

**NEXT STEPS**

1. Go to the [OSP State Contract](#) website and locate the contract being utilized.
2. Read the instructions for contract use. A state buyer is assigned to each contract and can be contacted for further information.
3. When you are at the point of creating a requisition for your purchase, use the Internal Memo field to reference the state contract being utilized.

**Q1.5)** Is the good/service being procured through an emergency procurement due to a critical emergency?

N

Y

A critical emergency is when human life or human health is imminently endangered.

IF NO (i.e., you answered NO to all five questions), then the good/service you are intending to purchase must go through a source selection process.

**NEXT STEPS**

There are multiple methods of source selection. The method that is appropriate for your purchase is determined by spend amount and good/service characteristics. Proceed to Step 2.

IF YES, the purchase is considered an emergency purchase and is eligible to bypass sealed methods of bidding.

**NEXT STEPS**

While emergency procurements may bypass the more complex methods of source selection, responsible spend control is still important and requires a Competitive Bid Quote if cost is ≥\$20,000. Competitive Bid Quote instructions are included under Q2.1.

## Step 2: Source Selection Method Determination

QUESTION	NO	YES
<p><b>Q2.1)</b> Is the cost of the good/service between \$20,000 and \$75,000?</p> <p>IF NO, proceed to Q2.2.</p> <p>IF YES, you must use the Competitive Bid Quote method of source selection.</p> <p><b>NEXT STEPS</b></p> <ol style="list-style-type: none"> <li>The Requester must identify a minimum of three (3) vendors that supply the good/service being purchased and obtain <a href="#">pricing documentation</a> from the (3) vendors.</li> </ol> <p>Pricing documentation is any document issued by the vendor which contains information about cost for a good/service.</p> <ol style="list-style-type: none"> <li>Download the <a href="#">Competitive Bid Quote Form</a>.</li> <li>Follow the form instructions to get the form reviewed and signed.</li> <li>When you are at the point of creating a requisition, attach the fully executed Competitive Bid Quote Form and pricing documentation.</li> </ol>	N	Y
<p><b>Q2.2)</b> Is the cost of the good/service greater than \$75,000?</p> <p>IF YES, you must use a sealed method of bidding.</p> <p><b>NEXT STEPS</b></p> <p>Sealed methods of bidding involve publishing a notice announcing an invitation for vendors to submit a bid (i.e., an offer) to be the supplier for the good/service being purchased. At the end of the bidding period, a grading sheet is used to evaluate bids that were received, and a vendor is selected.</p> <p>To determine which method of sealed bidding is appropriate, proceed to Q2.3.</p>	N	Y
<p><b>Q2.3)</b> Is price an acceptable factor upon which to evaluate vendor bids?</p> <p>IF NO, proceed to Q2.4.</p> <p>IF YES, Competitive Sealed Bid is the appropriate method of source selection.</p> <p><b>NEXT STEPS</b></p> <p>Call/email a Sr. Procurement Specialist to initiate the Sealed Bid. <a href="#">Procurement Services Contact Us</a> provides a directory of employees.</p>	N	Y
<p><b>Q2.4)</b> Are there technical or other evaluation factors which should be considered when evaluating a vendor bid?</p> <p>IF NO, Competitive Sealed Bid is the appropriate method of source selection.</p> <p><b>NEXT STEPS</b></p> <p>Follow the instructions for Competitive Sealed Bid as shown under Q2.3.</p> <p>IF YES, Competitive Sealed Proposal is the appropriate method of source selection.</p> <p><b>NEXT STEPS</b></p> <p>Call/email a Sr. Procurement Specialist to initiate the Competitive Sealed Proposal. <a href="#">Procurement Services Contact Us</a> provides a directory of employees.</p>	N	Y

## APPENDIX

**Table A: Select Exemptions Pertinent to UAMS**

Exemption Order	Brief Description
A	Advertising
B	Animals for research
Ci	Commodities available through GPO
Di	Commodities for resale in cafeterias, bookstores, gift shops
E	Contracts for construction of buildings, facilities, and major repairs
H	Fees, including medical and physician fees
J	Freight and storage
K	Licenses required prior to performance of services
M	Livestock for research
N	Office machine and technical equipment maintenance
O*	Medical items requested by a physician for treatment or diagnosis of patients
P	Professional memberships
Q	Perishable foods for immediate use
R	Postage
S	Publications for use in libraries or for other instructional purposes
T	Services of visiting speakers, performing artists
V	Travel expenses
W	Utility services
X	Works of art for public display
Y	Capital improvements
Z	Work force development services, specialized industry training, work force training
AA	Proprietary software after initial procurement
DD	Repair services for hidden or unknown damages to machinery that is already purchased
EE*,**	Commodities and services purchased by an academic medical center using revenue derived from and used for patient care and hospital enterprises.

To read the full list of exempt commodities and their descriptions, you may read §19-11-203(14) in its entirety in the [Arkansas Procurement Laws and Rules](#) book.

If you are unsure if any of the above exemptions apply to your intended purchase, please reach out to your assigned Sourcing Buyer.

\* These items must go through the value analysis process managed by Supply Chain Value Analysis before an expense contract and/or purchase is allowed unless critical medical emergency requires immediate action.

\*\* Using the EE exemption requires justification and approval. Download the [Exempt Commodity/Service Justification Form](#) and follow the form instructions to receive approval for use of the EE exemption. The completed form must be attached to the Requisition for the good/service being procured.