

Contract Quick Guide

The Purchasing Office oversees the procurement of goods and services by collaborating with units and communicating with vendors to ensure all Commonwealth and Mason policies are followed. [University Policy 2106](#) delegates purchasing and contracting authority for dollar amounts of \$5,000 or less to employees at the department level. Any purchase or contract over \$5,000 must be reviewed, and approved by the Purchasing Office and submitted through eVA. Step by step instructions for orders over \$5,000 are noted in the Use an Existing Contract section of this guide. Individuals must complete the [Purchasing Made Easy On-Demand Training](#) prior to obtaining a P-Card or access to eVA procurement.

Prior to purchasing any items, the following instructions and resources should be reviewed:

- **University faculty, staff, and students are not permitted to sign contracts or make obligations on behalf of the University for purchases that exceed \$5,000.** Only those individuals who receive an official Delegation of Signature Authority for the fiscal year from the Executive Vice President, or his/her designee, are authorized to sign contracts and/or make obligations on behalf of the university for spending levels of more than \$5,000.
- Use the searchable [Can I Purchase....?](#) table to learn about allowable and unallowable purchases and methods of procurement. Consult the [Purchasing Made Easy Manual](#) for extensive purchasing rules and procedures.
- Review the list of [Mandatory and Specialized Purchases](#). Mandatory contracts for purchasing all furniture, office supplies, and others, as designated by the Purchasing Department, must be honored at all dollar amounts. In addition, all staff will assist in the standardization of purchases for commonly procured goods and services by utilizing institution-wide contracts, where available. Click here to [Search Institution-wide Contracts](#).
- For one time-purchases that are not already under contract, departments are to attempt to use Micro SWaM, or if not practical SWaM (small, women, and minority-owned businesses) vendors. Departments may locate Micro/SWaM vendors at the following link: <https://www.sbsd.virginia.gov/directory/> or at https://logi.cgieva.com/External/rdPage.aspx?rdReport=Public.Reports.Report9001_Data.
- **For contracts of \$5,000 or less**, there may be terms and conditions that Mason, as a state agency of the Commonwealth of Virginia, cannot agree to. The [Contract Addendum](#) form should be attached to these contracts to “cancel out” or invalidate the prohibitive terms and conditions. Refer to the [Contract Addendum Instructions](#) for additional assistance. Follow the [Non-Catalog Quick Guide](#) to generate a Purchase Order. Contracts \$5,000 or less may be signed by individuals with organizational financial responsibility or their designees.
- The \$5,000 departmental threshold must not be circumvented by “splitting orders”. “Splitting orders” is defined as awarding multiple orders within a short time period to the same vendor that would exceed the delegated signature authority and prevent appropriate competition. Purchases that are \$5,000 or less, but are expected to regularly recur, should be bundled and entered into eVA to be assigned to a buyer in the Purchasing Department for execution.

Step by Step – Use an Existing Contract over \$5,000

1. Review the resources and instructions noted above. Identify an existing contract. Multiple quotes may still be required when using an existing contract in certain commodities. Review [Mandatory and Specialized Purchases](#) for more information

2. Ensure the vendor has a G number with Mason using the [Vendor G# Lookup](#).
3. Ensure the vendor has an active eVA account using the [eVA Vendor Search](#).
4. Contact the identified vendor(s), noting the contract number, to request a quote/proposal/SOW. The contract number should be included on the requested quote/proposal/SOW.
5. When obtaining services from an individual, the [Independent Contractor Evaluation](#) must be attached to the Purchase Requisition in eVA.
6. Follow the steps in the [Non-Catalog Quick Guide](#) to enter the Purchase Requisition into eVA. For contracts:
 - a. Add an appropriate *Commodity Code*. Common eVA commodity codes are:

91800	Consulting Services
49043	Laboratory and Scientific Equipment and Supplies
96115	Concession, Catering, Vending
92045	Software Maintenance/Support
96182	Transportation Services
95635	Internet Database Subscriptions

- b. Ensure that the contract number is identified in the *External Contract Number* field on each line of the requisition.

The screenshot shows a form titled 'Internal Additional Details'. Under the 'Product' section, there is a dropdown menu. Below that, under 'Supplier Visible Additional Information', there are fields for 'Contract' and 'External Contract Number'. The 'External Contract Number' field is highlighted with a yellow border. There is also a 'Comment' field at the bottom.

- c. Attach the vendors' quote(s), proposal, scope of work, or other required documents identified in step 5. Under *Attachments* select *Internal Attachment*.
 - d. Specific instruction for the other aspects of the eVA Order, such as allocation, are noted in the [Non-Catalog Quick Guide](#).

The screenshot shows a dropdown menu titled 'Select a document type'. The menu is open, showing two options: 'Internal Attachment' and 'Supplier Document'.

7. Once submitted, a Buyer in the Purchasing Office will review the order for completeness and establish the Purchase Order.
8. A buyer from Purchasing will then send the PO to the vendor and copy the requester if the vendor is not setup to receive the PO electronically through eVA.
9. After services are performed or goods are delivered, the vendor invoice must be sent to Accounts Payable with the corresponding PO number. To ensure prompt and accurate payment vendors should send invoices directly to acctpay@gmu.edu for processing. If the invoice is received by the unit, promptly send it electronically to acctpay@gmu.edu.

Step by Step – Make a Purchase over \$5,000 up to \$200,000 when there is not an existing contract

1. For purchases where the one-time or cumulative estimated cost of the materials, supplies, or services is greater than \$5,000 up to \$200,000, at least three (units are encouraged, but not required, to solicit at least four vendors when over \$100,000) written quotes/proposals should be obtained. There are two primary methods for conducting procurements when an existing vendor is not already under contract:
 - a. **Unsealed Bids:** When the award of the purchase is based on clearly defined quantities and specifications and pricing is the sole criterion.
 - i. Most purchases will be procured through this method.
 - ii. Departments must send identical bid specifications to all bidders in writing. Vendors can propose equivalents to bid specifications.
 - iii. At least two quotes must be from Micro/SWaM vendors, unless representation in that commodity is not available.
 - iv. If quotes are not acceptable, all vendors must be resolicited
 - v. Units must select the low bidder.
 - b. **Unsealed Proposals:** When the award of the purchase is based on vendors coming up with a proposed solution to a university need. Specifications and quantities are guidelines to help the vendor offer the best solution, which will likely differ between vendors. Unsealed proposals use a variety of criteria to make the award, but is not limited to price and the best overall value to the university may be considered. Weighted scoring and an evaluation committee are not required. It is recommended you email the purchasing department at Purch1@gmu.edu before proceeding. In many cases, the Purchasing Department can facilitate this process on your behalf.
 - i. Departments must send identical proposal requests to all offerors in writing.
 - ii. At least two proposals must be from Micro/SWaM vendors, unless representation in the commodity is not available.
 - iii. Further negotiation on price, incentives and deliverables may occur with the vendors after their proposals have been received.
 - iv. Units must write a justification providing for the specific qualitative factors why the chosen vendor is more advantageous to the university, if they are not the low offeror.
2. Ensure the selected vendor has a G number with Mason using the [Vendor G# Lookup](#).
3. Ensure the selected vendor has an active eVA account using the [eVA Vendor Search](#).
4. When obtaining services from an individual, the [Independent Contractor Evaluation](#) must be attached to the Purchase Requisition in eVA.
5. Follow the steps in the [Non-Catalog Quick Guide](#) to enter the Purchase Requisition into eVA.
6. Attach the vendors' quote(s) or proposal(s), scope of work, or other required documents identified in step 5. Under *Attachments* select *Internal Attachment*.
7. Specific instruction for the other aspects of the eVA Order, such as allocation, are noted in the [Non-Catalog Quick Guide](#).
8. Once submitted, a Buyer in the Purchasing Office will review the order for completeness and establish the Purchase Order.
9. After services are performed or goods are delivered, the vendor invoice must be sent to Accounts Payable with the corresponding PO number. To ensure prompt and accurate payment vendors should send invoices directly to acctpay@gmu.edu for processing. If the invoice is received by the unit, promptly send it electronically to acctpay@gmu.edu