

## Appendix B: Summary of Purchasing Procedures for Standard Purchases

(Excluding Special Purchases – see [section I.B of the Procurement Policy](#))

Schools or Units may have more restrictive requirements, contact your Finance Office for guidance.

Threshold <sup>(a)</sup>	REQUIRED for Federal Funds (100000-199999) Cost-Share Funds or Expenses Journalled onto Federal Funds	BEST PRACTICE for Non-Federal Funds (all other funds)
\$0-\$50,000  Micro Purchase	<ul style="list-style-type: none"> <li>University recognized Preferred Vendors are encouraged</li> <li>Visual Compliance monitors debarred suppliers on a daily basis</li> <li>Purchases should be distributed equitably among qualified suppliers to the extent practical</li> <li>No self-approval is allowed on federal funds</li> </ul>	<ul style="list-style-type: none"> <li>University recognized Preferred Vendors are encouraged</li> <li>Purchases should be distributed equitably among qualified suppliers to the extent practical</li> <li>Self-approval for purchase up to \$2,499.99 is allowed, but not recommended</li> </ul>
≥\$35,000  Debarment Certification for Federal Contracts	<ul style="list-style-type: none"> <li>Required for contract purchases ≥ \$35,000 subject to Federal Acquisition Regulations, a signed Debarment Certification Form is required or debarment language must be included in the contract before Harvard makes a purchase commitment</li> </ul>	<ul style="list-style-type: none"> <li>Not Applicable</li> </ul>
>\$50,000-\$250,000  Small Purchase  Simplified Acquisition Threshold (SAT)	<ul style="list-style-type: none"> <li>Complete and Upload VJF in B2P               <ul style="list-style-type: none"> <li>A minimum of 2 but recommend 3 written quotes (email is allowable) is required if purchase is not a single- or sole-source purchase</li> <li>University-recognized preferred vendors may be used as one of the written quotes. Back-up documentation regarding vendor selection justification, (quotes, explanation around sole source vendors etc.) must be kept on file or uploaded into B2P</li> </ul> </li> <li>Purchases should be distributed equitably among qualified suppliers to the extent practical</li> </ul>	<ul style="list-style-type: none"> <li>University recognized Preferred Vendors are encouraged, OR</li> <li>Should obtain a minimum of 2 but recommend 3 written quotes (email is allowable)</li> <li>Purchases should be distributed equitably among qualified suppliers to the extent practical</li> </ul>
>\$250,000-\$699,999 <sup>(b)</sup>	<ul style="list-style-type: none"> <li>Same as above, AND</li> <li>If a competitive proposal:               <ul style="list-style-type: none"> <li>Must conduct a formal written proposal process. Vendor selection should be awarded to the bidder whose proposal is most advantageous to the program with price being <u>one</u> of the factors. <b>Sealed bids</b> must select the vendor that meets the requirements &amp; has the lowest bid</li> </ul> </li> <li>Payments ≥ \$250,000 require electronic approval of Tub Financial Dean or Designee</li> </ul>	<ul style="list-style-type: none"> <li>Same as above, AND</li> <li>Should obtain a minimum of 2 but recommend 3 <u>written</u> quotes (email is allowable).</li> <li>Payments ≥ \$250,000 require electronic approval of Tub Financial Dean or Designee</li> </ul>
≥\$700,000+ (\$1.5M for construction)	<ul style="list-style-type: none"> <li>Same as above, AND</li> <li>Purchaser must develop minority vending goals &amp; complete Individual Subcontractor Reports (ISR) &amp; Summary Subcontract Reports (SSR) &amp; submit subcontracting plan if required by RFP</li> </ul>	<ul style="list-style-type: none"> <li>Same as above</li> </ul>

<sup>(a)</sup> See [Subrecipient vs Contractor Guidance](#) to determine if a subcontract or vendor/contractor and/or requirements of subcontracts under vendor/contractor contracts.

<sup>(b)</sup> See the [Procure-to-Pay Manual](#) regarding requirements for noncompetitive, competitive or sealed bid proposals and processes. Some bid types may require the selection of the lowest bidder, others may not. Contact your local school Finance or Procurement offices for guidance