



MARSHALL UNIVERSITY PROCUREMENT SERVICES

Direct Award Training



OVERVIEW

Pursuant to West Virginia Code §5A-3-10c and Marshall University Board of Governors Policy No. FA-9, the Director of Procurement Services may award a contract directly to a vendor without competitive bidding if certain requirements are met.

PURPOSE

Approval for a Direct Award exempts the transaction from the formal bidding process.

These purchases are not exempt from other Procurement policies or requirements, including but not limited to: MU Terms and Conditions or WV-96, Banner and wvOASIS Vendor Registration, issuance of an approved purchase order, etc.



HOW TO COMPLETE A DIRECT AWARD REQUEST FORM





Direct Award Information

Department:	The name of the department responsible for making the purchase.
Purchasing Agent:	Your department's designated Purchasing Agent.
Date of Request:	The date the form is completed.

1. Provide a description of the commodity or service (include any proposed contract documents or quote):

This section is where you will enter a description of the product or service you plan to purchase. Please attach any quotes, contracts, or other supporting documentation to this request.





2. Does this request include software or hardware?

☐

Yes

☐

No

Check the corresponding box if this purchase includes software or hardware.

3. Provide justification that a direct award is in the best interest of the state and university:

This section is where you will provide a detailed justification explaining why a Direct Award for this purchase is in the best interest of the state and the university. Your explanation should clearly outline the specific reasons a public solicitation or competitive bid process would negatively impact your project, such as delays, loss of continuity, specialized expertise required, or unique circumstances that make alternative vendors unsuitable.





4. Basis for Direct Award: Please select one of the following options and provide the requested information and documentation.

Select one option from the choices below and include details and supporting documentation to accompany your selection.

- ☐ **Competition is not available from any other source.** Please detail department attempts to identify other sources:

Select this option when the supplier your department has identified is the only source capable of providing the product or service, and therefore it is not possible to obtain competitive bids. This is referred to as a Sole Source.

- ☐ **No other vendor would be willing or able to replace the existing source without a detrimental effect on the department or university.** Please describe the detrimental effect in detail:

Select this option when there are multiple sources of supply, but for specific reasons the product or service must be purchased from a specified vendor. This is referred to as a Single Source.





5. Other Information Required for Direct Award:

- a. What is the deadline that the commodities must be delivered or the services completed?

Please let us know the required completion date for this project. Having this information will allow us to determine when the finalized purchase order must be in place to ensure there is no negative impact on your project timeline.

- b. What is the total cost or estimated cost for the commodity or service? (Include vendor quote.)

This section is where you will provide the total cost or, if the final amount is not yet known, the best available estimate for the commodity or service. Include all anticipated expenses associated with the purchase so the full financial impact can be reviewed and approved.

- c. What are the requirements or limitations a competing vendor would need to satisfy?

In this section, you will outline the specific requirements that any competing supplier would need to meet in order to be considered. The details you provide may be similar to the information included in Section Four regarding the Sole or Single Source determination.

- d. Is there any other information Procurement Services should be aware of regarding this request?

Please provide any additional information you believe would be helpful for Procurement Services to consider during their review of this request.

Signature of individual making this request.

Date of signature.

Department Signature

Date





Marshall University Procurement Services

DIRECT AWARD POSTING: Department Request and Public Notice Form

Direct Award Posting Notice

Statutory Authority: Pursuant to West Virginia Code §5A-3-10c and Marshall University Board of Governors Policy No. FA-9, the Director of Procurement Services may award a contract directly to a vendor without competitive bidding if certain requirements are met. The following form should be completed by the department and submitted to the Purchasing Office for Direct Award transactions.

Approval for Direct Award only exempts the transaction from the formal bidding process. These purchases are not exempt from other Procurement policies or requirements, including but not limited to: MU Terms and Conditions or WV-96, Banner and wvOASIS Vendor Registration, issuance of an approved purchase order, etc.

Direct Award Information

Department:	<u>The name of the department responsible for making the purchase.</u>
Purchasing Agent:	<u>Your department's designated Purchasing Agent.</u>
Date of Request:	<u>The date the form is completed.</u>

1. Provide a description of the commodity or service (include any proposed contract documents or quote):

This section is where you will enter a description of the product or service you plan to purchase. Please attach any quotes, contracts, or other supporting documentation to this request.

2. Does this request include software or hardware? Yes No

Check the corresponding box if this purchase includes software or hardware.

3. Provide justification that a direct award is in the best interest of the state and university:

This section is where you will provide a detailed justification explaining why a Direct Award for this purchase is in the best interest of the state and the university. Your explanation should clearly outline the specific reasons a public solicitation or competitive bid process would negatively impact your project, such as delays, loss of continuity, specialized expertise required, or unique circumstances that make alternative vendors unsuitable.

4. Basis for Direct Award: Please select one of the following options and provide the requested information and documentation.

Select one option from the choices below and include details and supporting documentation to accompany your selection.

Competition is not available from any other source. Please detail department attempts to identify other sources:

Select this option when the supplier your department has identified is the only source capable of providing the product or service, and therefore it is not possible to obtain competitive bids. This is referred to as a Sole Source.

No other vendor would be willing or able to replace the existing source without a detrimental effect on the department or university. Please describe the detrimental effect in detail:

Select this option when there are multiple sources of supply, but for specific reasons the product or service must be purchased from a specified vendor. This is referred to as a Single Source.

5. Other Information Required for Direct Award:

- a. What is the deadline that the commodities must be delivered or the services completed?

Please let us know the required completion date for this project. Having this information will allow us to determine when the finalized purchase order must be in place to ensure there is no negative impact on your project timeline.

- b. What is the total cost or estimated cost for the commodity or service? (Include vendor quote.)

This section is where you will provide the total cost or, if the final amount is not yet known, the best available estimate for the commodity or service. Include all anticipated expenses associated with the purchase so the full financial impact can be reviewed and approved.

- c. What are the requirements or limitations a competing vendor would need to satisfy?

In this section, you will outline the specific requirements that any competing supplier would need to meet in order to be considered. The details you provide may be similar to the information included in Section Four regarding the Sole or Single Source determination.

- d. Is there any other information Procurement Services should be aware of regarding this request?

Please provide any additional information you believe would be helpful for Procurement Services to consider during their review of this request.

Signature of individual making this request.

Date of signature.

Department Signature

Date

Sections Below are for Procurement Services Use Only:

Request for Direct Award Approved

Request for Direct Award Denied

Director of Procurement/ CPO Signature

Date



PROCUREMENT WEBSITE

Procurement Services:

www.marshall.edu/procurement-services

- **Information available on website:**
 - Staff Responsibilities
 - Policies and Procedures
 - Training Documents
 - Contracts
 - Forms
 - Bid and Proposal Opportunities



MARSHALL UNIVERSITY PROCUREMENT SERVICES

QUESTIONS