

## Instructions for Completing a Request for Waiver of Competitive Bidding

A Waiver of Competitive Bidding may be requested for any one of the reasons listed below:

Sole Source	<p>There is not another company that provides similar goods and/or services to the requested purchase; the goods or services have differentiation that make it unique in design, performance or use specifications.</p> <p><b>Example:</b> It is determined that only one distributor for a region has exclusivity and has been designated by a Manufacturer.</p>
Emergency	<p>Goods and/or services are needed to correct or prevent an emergency health, environmental or safety hazard; special or time sensitive events; and/or emergency repair/replacement of existing equipment essential for daily operations.</p> <p><b>Example:</b> During a snow storm in February the heat goes out in a building and repair is needed.</p> <p>“Emergency” waiver requests are evaluated under a shortened approval process, giving consideration to health, environmental or safety issues.</p>
Economic	<p>Responsible economic procurement relieves the University of potential additional expenses that would result from NOT making the purchase; and/or use of another supplier would result in incompatibility with existing conditions; and/or require considerable training, time and money; and/or the goods or services are being used in ongoing long-term projects.</p> <p><b>Example:</b> A department has an existing piece of equipment that needs to be updated and changing brands would require the purchase of other integrated equipment.</p>
Technical and Specialized Consulting Services	<p>The President and/or Senior Vice President for Business and Finance, or his or her designee, may grant a Waiver of Competitive Bidding when he/she determines that the services to be purchased are technical and specialized consulting services that are temporary in nature and there are sufficient economic reasons to support such a waiver and where such terms and conditions as are in the best interest of the University. The exercise of this authority shall be subject to the oversight authority of the Senior Vice President for Business and Finance.</p> <p><b>Note:</b> All technical and specialized consulting services requests for purchase require approval from the President’s Cabinet. See memo <a href="#">Managing Consulting Services</a> dated 2/19/14 and <a href="#">President’s Cabinet Approval Form</a> .</p> <p><b>Example:</b> A department requires a consulting service to satisfy a specialized nature of need that is temporary in nature.</p>

### Additional Justification Memo

When submitting a Technical and Specialized Consulting Services Waiver, the [Request for Waiver of Competitive Bidding](#) form should be accompanied by a justification memo, including:

1. Term/duration must be of a temporary nature.
2. Detailed description of specialized nature of need.
3. Detailed description of scope of work to be completed.
4. Pricing must be competitive. Include total cost as provided by desired vendor including any discounts provided. Also include pricing solicited from at least 2 other competitors for similar expertise and scope.
5. Funding source.

The purchase of goods \$25,000 or more and services of \$50,000 or more require competitive bidding. A waiver is an exception to the competitive bid process. As a result, explanation/documentation is required to begin the review process. The following documents from your department are required by Purchasing:

- Printed hardcopy of the approved requisition from the Financials System
- Completed [Request for Waiver of Competitive Bidding](#) form including appropriate signatures
- Detailed explanation/documentation
- Documentation from the supplier to support waiver rationale (i.e. quotation, contract, service agreement)
- Change order requisition, if applicable, to amend an existing purchase order/waiver

**Note:** For an update on the status of your waiver, check the activity comments on the requisition in the Financial System. All forms are available at <https://busfin.osu.edu/policies-forms>

**Contact the Purchasing Department with questions prior to submitting your waiver request.**

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