

PART I: PRELIMINARY QUESTIONS

Select a response for each question below which will assist units in assuring that the proper preliminary checks were taken prior to submitting this form.

University Contract. Wherever possible, the University should procure goods and services from suppliers that have active contracts in place with Rutgers. Units are advised to check RU Marketplace or contact [University Procurement Services](#).

Can the requested goods or services be provided under an existing University contract?

Yes No

- If Yes, **STOP**. This form is not required.

Excess or Surplus Inventory. An excess or surplus inventory check should be done to assess opportunity to avoid purchasing new equipment and vehicles. Units should refer to the University Materials and Logistics webpage.

Has surplus equipment been considered as an alternative to this purchase by checking the [excess or surplus inventory](#)?

Yes No N/A

Federally Funded. Will the unit utilize federal funds to finance this purchase?

Yes No

Does this purchase involve any video surveillance products or telecommunications equipment and services involving federal monies?

Yes No

Do you intend to purchase telecommunications equipment produced by Huawei Technologies Company or ZTE Corporation, (or any subsidiary or affiliate of such entities); and/or video surveillance and telecommunications equipment produced by Hytera Communications Corporation, Hangzhou Hikvision Digital Technology Company, or Dahua Technology Company (or any subsidiary or affiliate of such entities)?

Yes No

Capital Asset. Is this a purchase of a capital asset (e.g. computer/lab equipment; vehicles; machinery; etc.)?

Yes No

Small Business Participation. Rutgers encourages engagement with small and local businesses and is committed to providing them with equitable opportunities to compete for University contracts and bid solicitations. To identify small and local businesses, please refer to the [U.S. Small Business Administration](#) and [State of New Jersey](#) websites.

Have you solicited from a small business?

Yes No

- If Yes, please indicate in Part II below by checking the Small Business checkbox accordingly.

- If No, explain why not:

PART II: SUMMARY OF SOLICITATION

Detail the Specifications of the Solicitation Provided to Bidders (attach additional sheets, if necessary):

The unit should develop a uniform specification of the goods or services requested and solicit all prospective bidders with that specification. If services are requested, the specification should include the description of the services to be performed and any deliverables. If goods are requested, the solicitation should include the specification of the goods requested. The specifications must be general in nature and not specify "brand name only," unless an equivalent good or service is acceptable. Any supplier who helped develop the specification should not be included in the solicitation, nor be awarded the contract.

BIDS/PROPOSALS/QUOTES. List each bidder from which the unit solicited and received a bid/proposal/quote. Indicate the supplier you have chosen below by checking the box to the left. Also, indicate if the bidder falls into one of the supplier diversity classifications listed in Part I by checking the box to the right. **Attach to the RU Marketplace requisition copies of each bid/proposal/quote received and summarize below.**

Awarded Supplier	Bidder Name	Quote # / Proposal Name (if applicable)	Total Bid Price	Small Bus. Bidder
<input type="checkbox"/>				<input type="checkbox"/>
<input type="checkbox"/>				<input type="checkbox"/>
<input type="checkbox"/>				<input type="checkbox"/>
<input type="checkbox"/>				<input type="checkbox"/>
<input type="checkbox"/>				<input type="checkbox"/>

PART III: INFORMAL BID AWARD JUSTIFICATION

Select, and if necessary explain, the criteria used to determine why the awarded supplier was chosen.

- Supplier was the lowest bidder.
- Supplier was NOT the lowest bidder. Provide an explanation below to support your decision. Your decision must be based on scientific, technical and/or economic reasons. Attach additional sheets, if necessary.

PART IV: ADDITIONAL QUESTIONS & REQUIRED DOCUMENTS

Based upon the good or services being procured, select a response for each question below indicating whether additional University forms and/or documents are required prior to issuance of a purchase order.

Lease/Buy. Financing this purchase through a lease should be considered where appropriate.

If procuring equipment or vehicles, have you performed an analysis of lease versus other alternatives? Yes No N/A

*For further clarification and instructions contact [University Procurement Services](#).

Independent Contractor or Employee Determination (ICED). Is the supplier providing [professional services](#)? Yes No

- If Yes, have you attached the completed ICED Form? Yes No

*For further clarification and instructions on ICED refer to the [University Tax Services webpage](#).

Protected Information. Will the Supplier create, obtain, transmit, use, maintain, process, or dispose of social security data, credit card data, student data, financial data, protected health information (PHI) or General Data Protection Regulation (GDPR) information? Yes No

Business Associate Agreement (BAA). Will there be an exchange of protected health information (PHI) with the supplier? Yes No

- If Yes, in the Requisition (located under General) have you checked "Yes" in the BAA field and attached the completed BAA? Yes No

*For further clarification and instructions on the BAA refer to the [University Ethics & Compliance webpage](#).

Third Party Risk Assessment (TPRA). Will the supplier need to use, process, transmit, store or reproduce University data? Yes No

- If Yes, have you attached the completed TPRA report from OIT? Yes No

*For further clarification and instructions on the TPRA refer to the [University Information Protection and Security webpage](#).

Accessibility Purchasing Form. Is this an electronic and information technology based purchase? Yes No

- If Yes, Rutgers requires you to complete the Accessibility Purchasing Form. This form is not a required attachment for purchase. Users will receive an acknowledgement approval from OIT to proceed with the order.

*For further clarification and instructions on the Accessibility Purchasing Form refer to the [University Office of Information Technology webpage](#).

Facility/Construction Requirements. Is this engagement a facilities/construction-based project? Yes No

- If Yes, have you attached the supplier's [Public Works Registration](#)? Yes No

Do any of the following apply to your engagement? (check if applicable)

- Special utility hook-up (electric, gas, sewage, water.)
- Conditioned air (controlled humidity, ventilation, dry filtered air, compressed air etc.)
- Special foundation, lighting, ventilation, vacuum or steam connection etc.
- Disassembling and reassembling by FOS/Physical Plant
- Will toxic, flammable, or radioactive materials be used?
- Will this equipment weigh more than 80 pounds per square foot?
- Will existing room alterations be needed to adapt and/or admit the equipment?

- If any of these apply, have you attached the completed [Project Request Form](#)? Yes No

- If any of these apply, have you received written approval from your facilities manager? Yes No

University Communications and Marketing Requirements. The University has strict standards for Rutgers' logos, signatures and marks in all University communications, marketing initiatives, and university-authorized products.

Will the supplier be using Rutgers logo, signature and/or marks? Yes No

Will this purchase require ad review? Yes No

- If Yes to either question, the unit should refer to the [University Communications and Marketing webpage](#) for further clarification and instructions on branding, trademark and licensing, and/or advertising review and approval.

New Contract. Did the awarded supplier propose a new contract? Yes No

- If Yes, please attach a copy of the proposed supplier contract.