

**R.S. 38:2212.1 PURCHASING NEEDS ANALYSIS FORM
WITH SOLICITATION DECISION MATRIX**

[developed by LaMATS for LMA members; this form may be revised to match your specific purchasing policies]

Purchase File Number or Reference: _____ [date] _____

[This form can be used to document the purchase file when a decision is being made to buy supplies, materials or equipment that exceed \$500 in cost. **Do not use this form for a Public Works Project that exceeds \$250,000 in cost.**]

Item(s) and/or description: _____

Estimated cost: \$ _____

Item is classified as [purchase category]: _____

Briefly justify the need for this/these item(s): _____

Anticipated date item(s) needed by: _____

Total Purchase Category Spend to-date: \$ _____

Solicitation Matrix

1. Is the total *category* spend for the item anticipated to be less than \$10,000? ____Yes ____No—if **Yes**, then the best practice is to seek multiple price quotes. Please document the price quotes you obtained: 1) _____

2) _____ 3) _____

2. Is the total **category** spend for the item(s) anticipated to be more than \$10,000 but less than \$30,000? ____Yes ____No—if **Yes**, then Title 38 requires that you obtain at least three quotes by telephone, facsimile, email or other printable electronic means.

3. If receiving quotes by telephone, an offer must be confirmed in writing. You may document the quotes received below and provide an explanation if the lowest quoted item was not chosen:

1) \$ _____

2) \$ _____

3) \$ _____

4. Do you expect or know that the total category spend for the item(s) sought will exceed \$30,000 this fiscal year? If **yes**, then Title 38 requires a competitive sealed bid or a reverse auction. You may also determine if the item(s) sought are 1) available on one of your active, competitively bid contracts; 2) whether a piggy-back contract exists on a competitively bid contract with another agency; or 3) if the item can be found on an existing Statewide contract. *[LaMATS e-Auction & Bid Services (EASiBUY) allows you to place items quickly and efficiently for competitive bid or reverse auction.]*

- ***If a competitive bid is required***, Title 38 requires that a sealed bid or a reverse auction occur. If the purchase is for telecommunications, computers, data processing or related software/services, then a Request for Proposals (RFP) process is preferred. If a public works is valued under \$250,000 then an RFP or a Request for Quotes process may be used.
- ***If you have an existing contract to buy from***, make sure that the contract is still active and viable.
- ***If you are interested in a piggy-back contract***, you may check first with LPS to verify if an opportunity is available.
- ***If you believe buying off an existing Statewide contract is your best option***, you may check first with LaMATS to determine if the item(s) sought can be efficiently and cost-effectively bid to receive a lower price.

Please document by checking off the procurement method you determined to be in your agency's best interest and why. The second square on each line reminds you to ask whether or not the follow-up item was considered.

☐ Sealed Bid ☐ Electronic Means Considered?

☐ Reverse Auction ☐ Reverse Auction Policy in Place?

☐ RFP ☐ Electronic Means Considered? ``

☐ Piggy-Back ☐ Title 33 Piggyback? ☐ 38:321.1 Piggyback?

☐ Statewide Contract ☐ Electronic Solicitation Considered?

If you have any questions about the purchase process to use, please contact Paul Holmes, paul@lamats.net for guidance. Please place this completed form in the Procurement File to document your purchase process for audit purposes.