NEW YORK STATE | Office of General Services
Business Services Center

New York State Purchasing Requirements for BSC Customer Agencies

1 Preferred Sources

Corcraft, NYS Preferred Source Program for New Yorkers Who are Blind, NYS Industries for the Disabled

Preferred Sources must be considered first. State agencies are required to purchase from the list of approved preferred source offerings if it meets the agency's form, function and utility or the price meets the following thresholds: Corcraft commodities must be priced at or below fair market price. NYSPSP and NYSID commodities and services must be as close to, but no greater than 15% above, prevailing market price (what others would charge under similar circumstances). https://ogs.ny.gov/procurement/list-preferred-source-offerings

When an approved preferred source offering is available and not used, the agency must document how it did not meet its form, function, or utility or the price exceeds the threshold. See the Preferred Sources Guidelines: https://ogs.ny.gov/procurement/nys-procurement-bulletin-preferred-source-guidelines

	Purchasing Preferred Source Commodities & Technology		Purchasing Preferred Source Services	
	If Your Dollar Amount of Purchase is $0 - $150,000	If Your Dollar Amount of Purchase is $150,001 & over	If Your Dollar Amount of Purchase is $0 - $150,000	If Your Dollar Amount of Purchase is $150,001 & over
What purchasing method do I use?	Procurement Card where possible or Purchase Order	Agency-specific contract. Agency enters contract requisition in SFS.	Procurement Card where possible or Purchase Order	Agency-specific contract. Agency does solicitation and enters contract requisition in SFS.
Who solicits quotes or issues bid documents?[1]	Agency - Use published price lists	Agency - Use published price lists	Agency - Written Quotes (Price Concurrence)	Agency - Refer to Preferred Source Guidelines for Instructions
If Technology-related, is PTP approval required?[2]	YES - if $50,000 or more	YES - if $50,000 or more	YES - if $50,000 or more	YES - if $50,000 or more
Do I have to advertise in the Contract Reporter?	NO	NO	NO	NO
Do I need OSC approval?	NO	YES	NO	YES
Do I need a Vendor Responsibility Profile/ Checklist?	NO	NO	NO	NO
Do I need a Vendor Responsibility Questionnaire?	NO	NO	NO	NO
Is a NYS Procurement Lobbying Law form required?	NO	NO	NO	NO
Are there any MWBE and/or SDVOB Goals?	NO	NO	NO	NO

[1]For PCard purchases $10,000 or less, a receipt may be substituted for 1 written quote.
[2]Information Technology Services' Plan-to-Procure (PTP) approval is required for any IT procurement of a product or service equal to or greater than $50,000. Approval is also required when procuring from or requesting exemption from purchasing from any aggregate or enterprise agreement, regardless of dollar amount. Agencies submit their own request for PTP.

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2 NYS Centralized Contract

State agencies must use New York State centralized contracts after consideration of Preferred Sources. Centralized contracts are administered by OGS Procurement Services and can be found on the OGS public website: https://ogs.ny.gov/procurement Customer support is available at 518.474.6717.

	Purchasing COMMODITIES, TECHNOLOGY & SERVICES from a Centralized Contract — FOR ALL DOLLAR AMOUNTS	Purchasing COMMODITIES, TECHNOLOGY & SERVICES via Centralized Contracts that Require a Minibid/Request for Quote — FOR ALL DOLLAR AMOUNTS
What purchasing method do I use?	Agency procurement card where possible or Purchase Order	Agency procurement card where possible or Purchase Order
Who solicits quotes or issues bid documents?[1]	Agency - from contract price lists or as defined in the contract	Agency defines requirements, BSC or Agency conducts minibid or Request for Quote
If Technology-related, is PTP approval required?[2]	YES - If $50,000 or more	YES - If $50,000 or more
Do I have to advertise in the Contract Reporter?	NO	NO
Do I need OSC approval?	YES – If over $200,000	YES – If over $200,000
Do I need a Vendor Responsibility Profile/ Checklist?	NO	NO
Do I need a Vendor Responsibility Questionnaire?	NO	NO
Is a NYS Procurement Lobbying Law form required?	NO	NO
Is there an opportunity to use MWBE and/or SDVOB vendors on Centralized Contract?	A number of NYS Centralized Contracts are with MWBE and/or SDVOB vendors. Before selecting a contract vendor, be sure to review for an MWBE and/or SDVOB.	A number of NYS Centralized Contracts are with MWBE and/or SDVOB vendors. Before selecting a contract vendor, be sure to review for an MWBE and/or SDVOB.
Are there any MWBE and/or SDVOB Goals? [3]	MWBE and SDVOB policies vary by agency. Check your agency's MWBE and SDVOB policies.	Agency sets as defined in centralized contract requirements.

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[3]Executive Chamber approval of MWBE goals may be required for purchase, see page 4. In some cases, an agency may elect to use a SDVOB Set Aside in lieu of using a Centralized Contract. Please review the SDVOB Guidelines for additional information. View Guidelines →

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3 Open Market

Agencies may purchase commodities, technology and services in the open market when the procurement/purchasing need cannot be met by a Preferred Source or NYS Centralized Contract.

	Purchasing COMMODITIES, TECHNOLOGY & SERVICES in the Open Market			Purchasing COMMODITIES & TECHNOLOGY in the Open Market	Purchasing ONGOING SERVICES in the Open Market	Purchasing with a NYS small business, MWBE, SDVOB, recycled or remanufactured goods; food grown, produced or harvested in NYS
	If Your Dollar Amount of Purchase is $0 - $2,500	If Your Dollar Amount of Purchase is $2,501 - $10,000	If Your Dollar Amount of Purchase is $10,001 - $150,000	If Your Dollar Amount of Purchase is $150,001 & over	If Your Dollar Amount of Purchase is $150,001 & over	If Your Dollar Amount of Purchase is $150,001 - to the following: • MWBE, SDVOB: $1.5 million • Small Business, Recycled or remanufactured goods: $500k • Foods grown, produced, or harvested in NYS: $200k For purchases up to $150,001, open market guidelines apply.
What purchasing method do I use?	Procurement Card where possible or Purchase Order	Procurement Card where possible or Purchase Order	Purchase Order with Procurement Card or Purchase Order	Contract Purchase Requisition	Service Contract (ongoing requirement)	Contract Purchase Requisition
Who solicits quotes or issues bid documents?[1]	Agency - informal quote	Agency - 1 written quote	Agency - 3 written quotes	Agency or BSC IFB	Agency Formal Bid	Agency - 3 written quotes
If Technology-related, is PTP approval required?[2]	NO	NO	YES - If $50,000 or more	YES	YES	YES
Do I have to advertise in the Contract Reporter?	NO	NO	NO	YES	YES	YES
Do I need OSC approval?	NO	NO	NO	YES	YES	YES
Do I need a Vendor Responsibility Profile/ Checklist?	NO	NO	NO	YES	YES	YES
Do I need a Vendor Responsibility Questionnaire?	NO	NO	NO	YES	YES	YES
Is a NYS Procurement Lobbying Law form required?	NO	NO	YES - if over $15,000	YES	YES	YES
Do I need a completed ST-220 CA Certification?	NO	NO	YES - if over $100,000	YES	YES	YES
Is there an opportunity to use MWBE and/or SDVOB vendors in the Open Market?	Use the MWBE and/or SDVOB certified vendor lists to identify potential qualified vendors who could provide the goods or service. (*See p.4 for web links to the lists*)	Use the MWBE and/or SDVOB certified vendor lists to identify potential qualified vendors who could provide the goods or service. (*See p.4 for web links to the lists*)	Use the MWBE and/or SDVOB certified vendor lists to identify potential qualified vendors who could provide the goods or service. (*See p.4 for web links to the lists*)	Consider using increased discretionary spending threshold using MWBE and/or SDVOB vendors. If a formal solicitation is required, consider using set aside option for SDVOB vendors if two or more can provide goods or services, and/or incorporate MWBE and/or SDVOB Goals. SDVOB and MWBE goals are not mutually exclusive.	Consider using increased discretionary spending threshold using MWBE and/or SDVOB vendors. If a formal solicitation is required, consider using set aside option for SDVOB vendors if two or more can provide goods or services, and/or incorporate MWBE and/or SDVOB Goals. SDVOB and MWBE goals are not mutually exclusive.	Consider using increased discretionary spending threshold using MWBE and/or SDVOB vendors. If a formal solicitation is required, consider using set aside option for SDVOB vendors if two or more can provide goods or services, and/or incorporate MWBE and/or SDVOB Goals. SDVOB and MWBE goals are not mutually exclusive.
Are there any MWBE and/or SDVOB Goals?[3]	MWBE and SDVOB policies vary by agency. Check your agency's MWBE and SDVOB policies.	MWBE and SDVOB policies vary by agency. Check your agency's MWBE and SDVOB policies.	YES - if over $25,000	YES	YES	YES

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Division of the Budget B-1184 Approval thresholds

Thresholds are subject to change based on DOB Bulletins. Thresholds stated here are as of July 2023.

Purchase Type	NPS Type	DOB Approval Threshold (Attachment A or B)	Executive Chamber MWBE Participation Goals Approval Threshold (Attachment C)
Contracts - New		$50,000 or greater	$20,000 - $49,999
Contracts - Amendment		$50,000 or greater	$20,000 - $49,999
Contracts - RFP / RFI / Pre-contract*		$1M or greater	$20,000 - $999,999
Leases		$50,000 or greater	N/A
Local Assistance Grants		$50,000 or greater	$20,000 - $49,999
Capital - Change Orders/ Other		$50,000 or greater	$20,000 - $49,999
Capital - Construction		$1M or greater	$100,000-$999,999
Capital - Design		$1M or greater	$100,000-$999,999
NPS	Fleet Assets	$0 or greater	N/A
	Information Technology	$50,000 or greater	N/A
	Out of State Travel	$0 value or greater	N/A
	In State Travel	$500 or greater	N/A
	Contractual Services	$50,000 or greater	$20,000 - $49,999
	Employee Related Events	$500 or greater	N/A
	Membership Dues to Associations	$500 or greater	N/A
	Non-institutional Food Purchases	$500 or greater	N/A
	Promotional Items	$500 or greater	N/A
	Purchases	$50,000 or greater	$20,000 – $49,999
	Temporary Personnel Services	$50,000 or greater	N/A

Clarification of thresholds from DOB bulletin should be addressed through the agency's budget unit. Agency should document its decision in writing and include in the procurement record.

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About this Purchasing Requirements Guide

The information in this guide is intended to provide general purchasing criteria only. Please note that some requirements may vary. Specific requirements should be discussed with the BSC on a case-by-case basis. All employees involved in the vendor selection process should be familiar with the agency's Minority/ Woman Owned Enterprise (M/WBE) and Service-Disabled Veteran-Owned Business (SDVOB) usage goals. M/WBE and SDVOB vendors are to be solicited for quotes, whenever possible. SDVOB and M/WBE goals are not mutually exclusive. Equipment maintenance requirements should be placed on the Equipment Maintenance Insurance Policy (REMI Program) whenever practical. Agencies should never sign a vendor's form contract without consulting with their Legal Department.

Websites

Preferred Source Guidelines:
https://ogs.ny.gov/procurement/nys-procurement-bulletin-preferred-source-guidelines

OGS Public Website - Procurement Services
https://ogs.ny.gov/procurement

Certified MWBE List & Search
https://ny.newnycontracts.com/

Certified SDVOB List
https://sdves.ogs.ny.gov/business-search

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