

PURCHASING FORMS MANUAL

Subject: Bidding and Requests for Information

Section: 7.05

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The Bidding Process

University policy requires that at least three (3) written competitive bid/quotes be obtained on the purchase of goods or services totaling \$5,000 or more or blanket order purchases totaling \$15,000 or more. To expedite the process, use the Purchasing Department to obtain bids. Any department wishing to request a bid should communicate the specifications in writing as soon as possible to Purchasing. Involve Purchasing early in the process; Purchasing can also assist in making the arrangements for the vendor(s) to see you.

Quotes are required for other purchases. To clarify the quote requirement process, the summary below should help determine when a bid and/ or quote is necessary

- *For requisitions valued between \$0 to \$1499, no quote is required; just reference the full name of the person you talked to and the date.*
- *For requisitions valued between \$1500 and \$4,999, at least one quote (not invoice) is required. It can be faxed to the Purchasing Department (note the requisition Number) the same day you enter your requisition on-line. Purchasing will review the quote for the vendor's terms, conditions and pricing.***
- *For requisitions over \$5,000, (Facilities \$7,500) the Purchasing Department requires bids. A minimum of three written quotes are required. Submit a requisition along with a description and/or specification of the products or services desired. Allow 10 days for the bid process to be completed, provided no other additional information is needed. Purchasing will include the requisitioner in the review of the bids received for vendor terms, conditions, specifications, pricing and recommendations. ***
- *Department Responsibility - New vendors require w-9's. Independent contractors must complete the Independent Contractor form.*

Note: Purchasing reserves the right to seek additional information or quotes for any requisitions submitted to Purchasing. Departments submitting quotes for purchases over \$5,000 (Facilities \$7,500) must have used a format approved by purchasing prior to obtaining quotes.

****Bids and solicitations for a goods or services vendor completed by the requesting authority or department do not eliminate the responsibility to determine "fair and reasonable" pricing. Depending on the complexity of the intended procurement, determination of best value should include, but is not limited to, competing price quotations and/or references to purchases related to the University's negotiated contracts listed on the Purchasing website. The requesting authority or Department shall submit documentation supporting purchases (paper or electronic) to Purchasing along with the requisition.**

Requests for Product/Service Information

The Purchasing Department will assist any department in attempting to gather information about products or services. Requests should be processed in the following manner.

1. Contact the Purchasing Department with a request for product/service information (in writing preferably). Include a detailed description or specification.
2. Purchasing will refer the requesting department to the appropriate vendors that provide the products/services requested.
3. The requesting department decides which vendor's goods and services to consider and notifies Purchasing. If the item is over \$5000, it requires bidding. Specifications need to be developed and sent to the appropriate vendors.
4. If demonstration equipment is left in the department for evaluation, the vendor and department should notify Purchasing. This procedure does not or should not imply a firm commitment. Bidding is required for items over \$5000.
5. Purchasing will prepare requests for quotes and send specifications to the vendors. Each vendor will be given the opportunity to prepare in writing a proposal, which will include any necessary documentation on the item (e.g. terms, conditions, exceptions, and contract information). All proposals submitted by vendors are to be sent to Purchasing.
6. After all bid solicitations are received in Purchasing, evaluations are conducted, with the Department and Purchasing, based on predetermined criteria makes recommendations. The requesting Department completes a Purchase Requisition and forwards it to Purchasing.