# Informal Bid / Quote Request

# Guideline

**<u>When to Issue a Request for Informal Bid</u>:**

- State or University Funded Purchase: up to $100,000*
- Federal / Sponsored Funded Purchase: up to $350,000. *
- Multiple suppliers exist that can perform the service or supply the product.

* Micro purchases may still be made for purchases under $25,000

**<u>Complete the *Informal Bid/Quote Request Form*</u>:**

- The Request Date should be the date the Informal Bid/Quote Request is sent to the suppliers.
- Provide a Project/Reference Name & Number. If no project number exists, you may create your own if desired.
- Identify the location where Services will be provided, or Goods will be delivered.
- Provide the Requestor's name and the department (contact person for the Request).
- Assign critical dates allowing suppliers reasonable time to respond
  - Recommended timeframes:
    - Pre-Bid / Walkthrough Meeting: If a pre-bid or walkthrough is required, schedule from a date and time between 3 and 5 business days of Request Date (i.e., the date the Informal Bid/Quote Request is sent to prospective suppliers).
    - Questions/Request for Information ("RFI") Deadline: 5 or more business days after the Pre-Bid /Walkthrough date, if applicable, or 5 or more business days after the Request Date
    - Supplier Response Due Date:
      - If no Pre-Bid Meeting: 5 or more business days after the RFI question deadline.
      - If the answers to Questions (RFI) significantly impact the Scope of Work/Specifications, an extension to the final due date may be considered (if granted, the extension must be communicated by email to all prospective suppliers).
- Describe the Scope of Work / Specifications for Goods & Services.
  - Identify all required specifications and include supporting documents (i.e. drawings, additional background, etc). Draft a detailed description of the Scope of Work for Suppliers to review. Quotes that do not meet every required specification must not be considered for selection.
  - Other specifics to consider; delivery requirements, warranty or extended service needs, etc.
- If Specifications refer to a specific brand/ make/model, there must be a statement included in the Scope of Work that "equivalents may be submitted for review and acceptance"

**<u>The Bid Process</u>:**

- Select a minimum of three (3) qualified suppliers.
- Email the *Informal Bid/ Quote Request* on the *Request Date* to each vendor individually, and at the same time.
- RFI Questions submissions may only be received from a prospective supplier via email.

- RFI Questions submissions must not be accepted after the deadline
- If needed, extend the Supplier Response due date to ensure all Suppliers have sufficient time to respond.
- University Response to RFI Questions: within 2 to 3 business days following RFI Questions Due Date.
- Provide University Response to RFI questions to all suppliers via an Addendum.
- Supplier Responses cannot be opened/reviewed until after the Due Date and Time.
- Supplier Responses received after the Supplier Response Due Date and Time cannot be considered.
- Evaluate all Supplier Responses received; award to the responsible bidder with the lowest overall cost.

**Submit a Requisition for Purchase Order:**

- Submit a Requisition following the Purchase Requisition process.
- Select the appropriate Sourcing choice for the informal bid/3 quote process based on your funding choice: Either "…purchases between $25,000 to $100,000" if state or University funded or "…purchases between $25,000 to $250,000" if sponsored funds.
    - After selecting your sourcing choice, complete the form as prompted and attach the 3 quotes
    - If a Vendor did not submit a Response and they sent an email stating they will not be submitting a Response, then include this email as a response in the form.
    - Add Comments and additional Attachments to the Purchase Requisition as needed.
    - Attach all backup, emails, etc. for future reference to the requisition as applicable (i.e. for Procurement, Auditors, etc.)