

QUOTES FOR SMALL PURCHASES FORM

NOTE: See "General Information" for pertinent information and instructions in obtaining quotations.

For procurement item(s) costing more than \$1,000 with a maximum total of \$50,000, "a procurement unit shall obtain a minimum of two competitive quotes that include minimum specifications and shall purchase the procurement item from the responsible vendor offering the lowest quote that meets the specifications." Administrative Rule R33-5-107

BUYER'S NAME:	DEPARTMENT:
PURCHASE ORDER #:	REQUIRED DELIVERY DATE:
REQUIRED SPECIFICATIONS(Attach sheet if more room is needed):	

	Vendor #1	Vendor #2	Vendor #3
Vendor Name:			
Sales Person:			
E-mail Address:			
Telephone:			
Date/Time of Quote:			
Vendor Quote Number:			

Quantity Needed	Quantity/ Unit	Description of Product(s) / Service(s) to be Purchased	Vendor 1* Quote	Vendor 2* Quote	Vendor 3* Quote
TOTAL: To UPDATE total RIGHT click in the column and choose "Update Field"			\$ 0.00	\$ 0.00	\$ 0.00
<i>*Ask the vendor if the delivery cost is included in the quote provided. If it is not, add delivery cost as another procurement item.</i>					

COMMENTS:	AWARDED TO:
BUYER (By signing I agree to abide by Vanguard's Procurement Policy)	DATE:
DIRECTOR/ASSISTANT DIRECTOR APPROVAL: (Purchases over \$1,000)	DATE:
FINANCE APPROVAL (Purchases over \$5,000)	DATE:

This request for quotation sheet must be attached to the payment for auditing and GRAMA purposes. The buyer is encouraged to read Utah Procurement Code 63G-6a-506 Small purchases and Administrative Rule R33-5-104 Small Purchases and R33-5-107 Quotes for Small Purchases.

QUOTES FOR SMALL PURCHASES: RULES and PROCEDURE

RULES:

When obtaining quotes, the request for quotation must adhere to the following rules.

1. Understand and Follow Vanguard Academy's Procurement Policy.
2. Procurement good(s) or service(s) that are available from a mandatory use agency or from a State "Best Value" Cooperative Contract may not be procured through the request for quotation process.
3. For procurement item(s) over \$1,000 with a procurement total no greater than \$50,000, we must obtain price quotes from at least two, but preferably three vendors. Price quotes can be obtained by email, fax, letter, or phone, and must be from a representative of an established, viable vendor.
4. Quotes should be documented on the *Quotes for Small Purchases Form*. Email and other written quotes should be attached to the form.
5. To encourage competition, the specifications and delivery date established by the Agency must be reasonable and not overly restrictive.
6. The procurement item shall be purchased "from the responsible vendor offering the lowest quote that meets the specifications." (R33-5-107 (1))
7. When the procurement is complete, the *Quotes for Small Purchases Form* and all procurement information and supporting documentation must be maintained according to the retention schedule published by the Division of Archives.
8. You may contact the business office for assistance, if required, including assistance in identifying potential vendors.
9. During the process of obtaining quotes, DO NOT disclose price, delivery, brand, or other information concerning other quotes that you have obtained. To disclose the information violates the competitive nature of receiving quotes. After the procurement is complete, prices are public information under the Government Records Access and Management Act (GRAMA).
10. R33-24-105: In order to preserve the integrity of Vanguard Academy's procurement process, an employee may not take part in any procurement process, contracting or contract administration decision (R33-24-105):
 - a. relating to the employee or a family member of the employee; or
 - b. relating to any entity in which the employee or a family member of the employee is an officer, director or partner, or in which the employee or a family member of the employee owns or controls 10% or more of the stock of such entity or holds or directly or indirectly controls an ownership interest of 10% or more in such entity.
 - c. "Family member" means a father, mother, husband, wife, son, daughter, sister, brother, uncle, aunt, nephew, niece, first cousin, mother-in-law, father-in-law, brother-in-law, sister-in-law, son-in-law, or daughter-in-law (63G-6a-2402(3)).
11. If a procurement process, contracting or contract administration matter arises relating to the employee or a family member of the employee, the employee must advise his or her supervisor of the relationship, and must be recused from any and all discussions or decisions relating to the procurement, contracting or administration matter. The employee must also comply with all disclosure requirements in Title 67 Chapter 16, Utah Public Officers' and Employees' Ethics Act(R33-24-105).

QUOTES FOR SMALL PURCHASES: RULES and PROCEDURE

PROCEDURE:

- 1) Obtain appropriate internal approval from Vanguard before obtaining quotes.
- 2) Research procurement item(s) to determine what specifications you require.
- 3) On the *Quotes for Small Purchases Form*, write down all required specifications for the item(s) the agency wants to buy. Outline minimum specifications including features, functions, or services. Brand Name/Model can be used, however, approved equivalents must be considered in making award. Avoid being overly restrictive.
- 4) Determine the required delivery date. Avoid being overly restrictive.
- 5) When emailing, faxing, mailing, or calling potential vendors the specifications, please do the following:
 - a. Identify you represent Vanguard Academy and indicate that you are asking for a formal quote that may result in a binding contract.
 - b. Supply the shipping destination and required delivery date.
 - c. Using the description written during step 2 above, inform the vendors of the item(s) required. If requesting quote by phone, write down all pertinent information pertaining to item(s) being quoted by vendors, including any deviations from specifications.
 - d. Ask for unit price to supply the required item(s) to Vanguard.
 - e. Ask if shipping costs are included in the quote supplied. If not included, request the shipping costs.
 - f. Ask for the number of days required for delivery after the receipt of the order to verify that the date meets the required delivery date.
 - g. Ask for Warranty terms (if applicable).
 - h. If a contract will be created for this purchase, please contact Suzanne Owen or Kathleen Kingston as they are the only ones authorized to enter into a contract on behalf of Vanguard.
- 6) After obtaining quotes, determine the lowest quote that meets your minimum specifications and required delivery date.
- 7) In the event that you have contacted every known vendor for the commodity or service and only received one quote, contact the business office for authorization to proceed.
- 8) When the internal approval process is complete, notify the successful vendor of the award.
- 9) *Request for Quotation* document, correspondence, quotes, receipts, email, award decision, invoices, other paperwork, etc. must be filed together. File must be maintained for six years for audit and GRAMA purposes.