

Title: Quotations
Effective Date: 1/1/18
Supersedes No.: P-400

Policy No.: P-290/1
Approved By:
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I Purpose

To provide policy concerning the solicitation of competitive quotations.

II Scope

This policy applies to transactions on materials, products, supplies, and/or services with an estimated unit price of under \$15,000.00 and not covered by a contractual agreement. In accordance with the Uniform Administrative Requirements, this includes "Micro-purchases" and Small Purchases" costing less than \$15, 0000.

III General

The Purchasing Department is responsible for obtaining quotations on material and/or services that are expected to exceed \$100.00. This shall be done for both estimating purposes and purchase. A price check will be made on expenditures less than \$1,000.00 when buying unfamiliar materials.

The Purchasing Director is responsible for obtaining quotations and making purchases involving the use of federal funds that are made in accordance with the Uniform Administrative Requirements: Procurement Standards and all applicable State and local statutes, rules and policies that do not conflict with the Uniform Administrative Standards.

Essential to full compliance with this procedure on Quotations is parallel compliance to Procedure P-550 General Guidelines for all Purchases. These procedures need to be followed in conjunction with one another. See Procedure No. P-550 for more detail.

A. Types of Quotations

1. Verbal. Verbal quotations will be obtained for budgetary estimations only. Prices are to be recorded on the "Quotation Summary Sheet" for future reference.

2. Written. Written request for quotations will be sent to vendors for purchases of standard or complex material with an estimated unit price between \$1000.00 and \$15,000.00. Prices are to be recorded on a "Quotation Summary Sheet" that will serve as backup documentation after the order is placed. The "Quotation Summary Sheet" will be attached to the original requisition or purchase order.

Written request for quotations will also be sent to vendors under the following conditions:

- a. All capital equipment purchases.
- b. Non-standard conditions, requirements, instructions etc.
Any occasion where more permanent documentation is advisable. Written quotations should be typed using, whenever possible, the "Request for Quotation" form. Complete information should be provided including, but not limited to, quantity, description, delivery requirement, special conditions, drawings, specifications, date information required, etc. If replies are to conform to a certain format, this should be spelled out. Buyer must be thorough and attempt to remove all known variables.

B. The Buyer, when purchasing materials and/or services requiring written requests for quotation, will solicit prices from three or more vendors. A minimum of two suppliers is acceptable for verbal requests, providing the Buyer is familiar with the market and prices of the material in question. In case of proprietary items, more than one price is often not possible and should be noted on the requisition.

C. Buyer, when obtaining quotations, should keep in mind other segments of the Agency or Diocese that may be able to provide the desired material or services. If there are any questions, contact the Purchasing Director.

D. Quotations will be solicited only from vendors whom the Buyer knows are qualified or can be qualified to meet all requirements. Maintenance of an "Approved Vendor List" is advisable. Examination of the financial condition of the company, its ability to perform, and facilities should be part of the criteria for an acceptable vendor.

E. Answers to technical questions arising during the quotation period should be provided by the requisitioner. The Buyer should coordinate the reply and ensure all potential suppliers are provided the same information.

F. After all quotations have been received and examined for completeness; a "Quotation Summary Sheet" is to be prepared noting all the pertinent data and discrepancies. Determination of the low bidder and award of the order will be made by the Buyer only after all aspects including preference of the requisitioner have been considered.

G. A Buyer will not reveal to a vendor at any time the prices quoted or paid.

H. In order to ensure that vendors contacted have responded to a request for quotation, Buyers will identify on the "Quotation Summary Sheet" all vendors solicited and responses.

I. It is a good practice to notify unsuccessful vendors that the quotations have been closed and the contract awarded.

J. Unless a specific exception has been obtained from the Purchasing Director, quotations shall not be solicited from, nor any order placed with a company that:

1. Is owned, controlled or actively influenced by any Agency or Diocese employee or immediate relative of said employee.

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2. Employs in a management, consulting or sales capacity any person who is an Agency or Diocese employee.
 3. Employs in any capacity an employee who is in a position to influence the selection of, or conduct business with, such supplier.
- K. When circumstances warrant the solicitation of quotation inappropriate, the Buyer shall document the facts on the reverse side of the purchase requisition and obtain the specific approval of the Purchasing Director.

