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SECTION 1: POLICY OVERVIEW

The university encourages competition among vendors providing goods and services to the university. Competition assures an optimal mix of quality, service, and price for the university. Personnel involved in vendor selection have the responsibility to search broadly and thoroughly for viable vendors.

Competitive bidding is required for all expenditures **in excess of \$5,000**.

SECTION 2: PREPARING A BID/REQUEST FOR PROPOSAL (RFP)

- A. When a project or purchase of goods or services in excess of the bidding threshold is identified, the requester will prepare specifications for a bid/RFP.
- B. Bid specifications must include the following criteria:
 - 1. Detailed product/service descriptions
 - 2. Ability to supply the product or service
 - 3. Cost
 - 4. Quality
 - 5. Payment Method
 - 6. Payment Terms
 - 7. Timeliness of product/service delivery
 - 8. Shipping or delivery costs
 - 9. Shipping or delivery terms
 - 10. Sales tax exemption
 - 11. Vendor insurance requirements
 - 12. Construction Only: Retention/Performance Bond
 - 13. Construction Only: Builder's Risk Insurance
 - 14. Maintenance requirements
 - 15. Customer service expectations/needs
 - 16. Due date for receipt of bids/proposals
 - 17. References (for service vendors)
 - 18. Other factors necessary to the selection of an appropriate vendor (e.g., requests for samples, meeting availability for proposal presentations, facility visits, etc.).
- C. The requester will research available vendors, select no less than three (3) to bid upon the project/goods/services, and transmit the bid specifications/RFP to the vendors. If less than three vendors are available to bid, the requester must justify the lesser number of bids on form 405.102F1: Competitive Bid Analysis & Justification of Vendor Selection.

SECTION 3: BID ANALYSIS AND VENDOR SELECTION

- A. Requester will collect all necessary bid documents by the specified due date. Requester will use only bids received by the specified due date in the selection process.
- B. Using form 405.102F1: Competitive Bid Analysis & Justification of Vendor Selection, the requester will review the data provided from each vendor and select a winning bid.
- C. Requester will submit any required contracts to the appropriate parties for review and approval (see form 400.004F1: Contract Checklist) prior to making a final decision.

- D. Requester will collect all necessary documents, submit a purchase order request for approval. Requester should not assume the purchase/project or vendor is approved until the purchase order request is approved by all necessary parties.
- E. Once a PO is created, the requester will notify the winning and rejected vendors of the University's decision.
 - 1. The requester is obligated to inform the rejected vendors only of who won the bid. All other details of the bid and selection process must remain confidential.
- F. Requester will transmit the purchase order and contract (if applicable) to the vendor to place the order.

SECTION 4: POST-SELECTION DUTIES

- A. Requester will collect all necessary documents, submit a purchase order request, then transmit the purchase order and contract (if applicable) to the vendor to place the order.
- B. The requester is responsible for keeping **all** bid documentation on file for three (3) years or the length of any applicable contract, whichever is longer.
- C. A copy of all contracts associated with the selected bid must be sent to Administrative Services for filing.
- D. An electronic copy of all documentation related to the winning bid must be transmitted to Administrative Services for filing.