

## Formal Bid Guidelines

1. Purchases with a total price of \$10,000 and over, including shipping and handling, for an item or any given project (i.e., furniture for a room, promotional items needed for the semester, etc.) must be bid using the formal bid process. One of the following processes will be used to seek competitive bids: Request for Quote (RFQ), Invitation for Bid (IFB), or Request for Proposal (RFP) (see definitions in item 16 below).
2. Purchases from State and ESU contracts are exempt from bid procedures.
3. Orders shall not be split to avoid the \$10,000 formal bid process. Order splitting is a violation of state law and University purchasing policies.
4. All technology-related orders will need to be reviewed and approved by IT for conformance with University standards related to the institution's technology architecture and information security policies and procedures. IT will be able to assist departments with specifications, support issues, product recommendations and quotes. Technology-related items include but are not limited to the following: computer hardware, software, printers, scanners, Netbooks, iPads, cameras and related equipment or peripherals. It is recommended that IT be contacted prior to starting the bid process.
5. All promotion, publicity, and/or marketing orders will need to be reviewed and approved by Marketing and Media Relations for conformance with University standards/guidelines. Marketing and Media Relations will be able to assist departments with creating artwork and design. It is recommended that Marketing and Media Relations be contacted prior to starting the bid process.
6. Specifications along with a minimum of 3 vendors to contact should be sent to Purchasing as a word document.
7. The specifications will be used to publicly post a bid on the ESU Purchasing web site at <http://www.emporia.edu/busaff/>. If a vendor provided the department with a quote prior to the bid, the vendor must submit their final bid to the ESU Purchasing Office by the bid closing date and time.
8. Bids with an anticipated total between \$10,000 and \$25,000 will need to be posted to the ESU website for 3 business days. Bids with an anticipated total of \$25,000 and above will need to be posted to the ESU website for 7 business days. Please allow the Purchasing Office a minimum lead time of three weeks for bid submission \$10,000 and above.
9. After the bid closes, the Purchasing Office will send the bid responses in an Excel spreadsheet to the department for review. When necessary, a Procurement Negotiation Committee (PNC) will evaluate bid results.
10. NEVER disclose a vendor's quoted price to another vendor, even after the bid has been awarded. Information regarding the bid results can only be given to the vendors by the Purchasing Office once the bid has been awarded or a fully executed contract has been obtained. Additional information can be obtained by submitting a written request per instructions within the bid document.

11. The department will respond indicating whether they accept the low bid or provide a justification for bid selection. Tax clearance must be met before a bid will be awarded. Once the awarded vendor is determined and when necessary, a fully executed contract is achieved, the department will create a Purchase Requisition to the awarded vendor, specifying the product and pricing information and route to the Purchasing Office. Once approvals are obtained the purchase order will be faxed to the vendor or returned to the department for ordering with a BPC.
12. All awarded bids or accepted purchases resulting in a contract, including click through agreements, must be reviewed and signed by the appropriate ESU official (see Appendix A, Section 3). Certain contracts may also require external review and authorization. The University President is the authorized signatory for University contracts and may delegate this authority in writing with appropriate notice through the University General Counsel's Office to the State of Kansas and the General Counsel of the Kansas Board of Regents. The University Office of General Counsel is responsible for coordination and provision of the legal review of contracts and purchasing related issues. Once the contract has been properly executed, a purchase requisition can be submitted to Purchasing.
13. The invoice is sent to Accounts Payable.
14. The Formal Bid Process can be waived for purchases such as sole source with approval of the Controller's Office. A "Prior Authorization Form" must be completed and submitted to the Controller's Office. The approved "Prior Authorization Form" must accompany the purchase requisition.
15. Contact the Purchasing Office at ext. 5145 with any questions.
16. One of the following processes will be used to seek competitive bids:
  - a) **Request for Quotation (RFQ)**. An RFQ is generally utilized when the supplies, materials, equipment, goods, property or services are to be acquired on a one-time basis and detailed specifications can be provided.
  - b) **Invitation for Bids (IFB)**. An IFB is generally utilized when the supplies, materials, equipment, goods, property and services to be acquired will be provided via contract on a recurring basis over a specified period of time. With an IFB, the price is non-negotiable and we must accept the low bid meeting specifications.
  - c) **Request for Proposals (RFP)**. An RFP is generally utilized when multiple factors exist that make it difficult or impossible to write specifications and also when terms and conditions can be prepared that will allow an evaluation for identifying the lowest responsive bid from a responsible bidder. Evaluations shall be based on the factors set forth in the RFP in order to determine which proposal(s) best meet(s) the needs of the University. A Procurement Negotiation Committee (PNC) of no less than three individuals shall evaluate all proposals received. Two of these three individuals shall be a member from the requesting department, and the Director of Purchasing shall be the third member. Requests for Proposal for University-wide contracts, including but not limited to, food service, bookstore, banking, snack vending, and beverage contracts, require the addition of the Controller and the Vice President for Administration and Fiscal Affairs or designee to the PNC.