

## Informal Bid Guidelines

1. Purchases with a total price between \$5,000 and \$9,999, 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 informal bid process.
2. Purchases from State and ESU contracts are exempt from bid procedures.
3. Forms required for the informal bid process can be obtained from the Purchasing Office, ext. 5145 or from the following website: <http://www.emporia.edu/busaff/>.
4. A prior authorization shall accompany the Purchase Requisition (PR) if a State and/or ESU contract exists and is not utilized, allowing ESU to document the extent to which savings are occurring. ESU requires a minimum savings of \$100 for off-contract purchases.
5. Orders shall not be split to avoid the \$5,000 to \$9,999 competitive bid process. Order splitting is a violation of state law and University purchasing policies.
6. It is required that the department notifies a minimum of three vendors of the Informal Bid Quotation. Vendors must submit bids on the IBQ form via mail or email to the requesting department by the closing date and time listed on the IBQ form. Late bids will not be considered. If the item is on a State and/or ESU contract, include a contract vendor as one of the bidders.
7. 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.
8. 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. Only a LRG licensed vendor approved to produce Emporia State University products prior to bid closing will be considered. A list of LRG licensed vendors approved to produce ESU products can be found at <http://lrgusa.com/>. It is recommended that Marketing and Media Relations be contacted prior to the start of the bid process.
9. Include a quotation number on the IBQ form. Departments should use their org number, fiscal year and sequential number for this purpose, i.e., 6040-1101.
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. Vendors can obtain additional information by submitting a written request to Purchasing.
11. Do not establish specifications in a manner to effectively exclude any responsible bidder offering comparable supplies, materials, equipment, or contractual services.

12. Verify the shipping, set up charges, other charges, and payment terms. If a vendor bids "FOB Origin," ask if it is "Freight Paid" or "Prepay and Add Freight to Invoice." Either way, make sure that the vendor has included all freight costs and all other charges in the bid or made you aware of freight costs and all other charges.
13. The department shall submit the Informal Bid Quotation spreadsheet, including vendor and bid information, along with the Informal Bid Quotation bid results and other supporting documentation to Purchasing. The department will indicate on the spreadsheet whether low bid is accepted or provide justification for bid selection. Upon completion of the review process, Purchasing will notify the department when the order can be placed.
14. If the total cost exceeds \$9,999.99, the bid will need to be posted in accordance with the formal bid process. The specifications will be used to publicly post a bid on the ESU Purchasing website. If a vendor provided the department with an IBQ bid, the vendor must submit their final bid to ESU Purchasing by the bid closing date. Purchasing will email bid results in an Excel spreadsheet to the department for review. The department will respond to the results, indicating whether they accept the low bid or provide a justification for bid selection. Purchasing will notify the department when the order can be placed.
15. If the awarded vendor accepts the BPC, the cardholder's name listed on the Informal Bid Quotation spreadsheet will have their BPC limit increased if indicated as such. The Purchasing Office will communicate the increase to Accounts Payable. Use of the BPC is highly encouraged. An OnBase Purchase Requisition will be completed for BPC technology and marketing purchases. Once approvals are obtained, the PO will be returned to the department for ordering with the BPC. The Purchase Order number will need to be referenced on the BPC log in the PO# field.
16. If the awarded vendor does not accept a VISA credit card, a Purchase Requisition still needs to be submitted. After approval of the PR by the Controller, the order will be faxed to the awarded vendor.
17. 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.
18. If the Informal Bid process has taken place but an order will not be placed, documentation must still be submitted to the Purchasing Office to allow appropriate responses to vendor inquiries.
19. The invoice/receipt is sent to Accounts Payable.
20. The Informal 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.
21. Contact the Purchasing Office with any questions.