

Competitive Bid Best Practices Info

Procurement has shared the Competitive Bid Best Practices flow chart (please refer to the link above on the PHYS BO website), which outlines the steps in the competitive bid process for purchases \$10K or greater. This is the process that Procurement will use going forward. As you can see from the flow chart Procurement is encouraging early involvement of Procurement once you have identified your need. At that point Procurement would like to discuss the specification, compile the minimum specs, and then discuss potential sources.

If a true sole-source is verified then the waiver is completed and signed by Procurement. However, the quote is still obtained by Procurement on the required RFQ form. The Purchasing Clerk in the PHYS Business Office will attach the documents to the shopping cart and will flow through the approval process in the business office. Once the shopping cart reaches the Procurement order cockpit it is ordered. Note, this is the only time a waiver form would be completed.

If multiple sources (more than one) are identified, the minimum specification is given to Procurement and they conduct the formal competitive bid process (Request for Quote Process). Of course that can include pre-bid meetings, pre-qualification of suppliers, demo scheduling, etc. or whatever else is required by you, the customer. Once bids are received, Procurement will evaluate and come back together with the department (PI) for a final review and recommendation. The department (PI) has the final sourcing selection decision and supporting documentation of that decision is given to Procurement to include in the RFQ file for justification for audits and/or public record requests. The successful bidders quote is used for entering the shopping cart and flows to Procurement for final order as previously discussed above.

This process is required by Federal and State guidelines to maintain the university's level of funding. Over the years and for various reasons, deviations from the process have been allowed. Procurement is now under new management and under greater scrutiny to make sure their choices are data driven and will uphold internal and external audits, as well as creating opportunities and fairness of bidding for our suppliers, which in turn increases the value for the customer. Procurement's hope is that you will contact them early when your need is identified. The key is working together to eliminate duplication and waste during the process and getting what is needed in a timely manner.