We are here to help!

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All forms and tools can be found on the
Procurement Services website at:
http://www.montana.edu/wwwbu/procurementservices
START HERE: Base your purchase on total contract value. This includes the initial contract term, plus any renewals or options.

**Total contract value of $0-$5,000.00**

**Department may purchase.**

**REQUIRED ACTIONS**
- Complete Property Asset Redistribution Request (PARR) for purchases involving trade-ins.

**RECOMMENDED ACTIONS**
- Consult with ITC on any IT purchases.
- Shop around for the best deal.
- When possible, use p-card to pay for goods.
- Issue a Contracted Services Agreement (CSA) for services.

**On all purchases REGARDLESS of dollar amount:**
If purchasing services from an individual, please contact 994-5727 or email ubshelp@montana.edu to discuss Independent Contractor requirements.

**Total contract value of $5,000.01-$25,000.00**

**Department may purchase.**

**Purchases may be made off state term contracts or authorized cooperative agreements without issuing competitive solicitation. Contact Procurement Services to discuss.**

**REQUIRED ACTIONS FOR ALL OTHER PURCHASES**
- Conduct a Limited Solicitation to obtain a minimum of three quotes. Quotes must include any freight charges.
  - Record on PD-20 Tabulation of Bids.
  - Must accept the lowest quote that meets specifications.
  - If required item is only available from one supplier:
    - Complete PD-14 Sole Source Justification.
    - Obtain quote from sole vendor.
  - If brand is required but is available from multiple suppliers:
    - Complete PD-13 Brand Name Justification.
    - Limited Solicitation is still required.
- Consult with ITC on any IT purchases (recommended).
- PARR form for purchases involving trade-ins.

**TO COMPLETE PURCHASE**
- For Goods: Department issues Departmental Purchase Order (DPO) or emails completed PD-20 or PD-14 and copy of quote(s) to purchase@montana.edu to request a one-time p-card increase.
- For Services: Department issues Contracted Services Agreement (CSA). See note on left.

All procurement paperwork, along with invoices, must be attached to BPA or p-card reports for archival purposes. Keep a copy in department files.

**Total contract value exceeding $25,000.00**

**Procurement Services must purchase.**

**REQUIRED ACTIONS**
- Complete PD-1 Purchase Requisition and obtain proper signatures. Include:
  - Required specifications.
  - Required delivery date and delivery location.
  - List of potential vendors including contact names and email addresses.
  - Funding information including index(es), account codes and any funding splits.

Send Purchase Requisition to Procurement Services with attached specifications.

**And complete any of the following that apply:**
- PARR for purchases involving trade-ins.
- PD-13 Brand Name Justification when specific brand is required but multiple vendors sell the brand.
- PD-14 Sole Source Justification if the required item or service is only available from one vendor.

**WHAT HAPPENS NEXT?**
- Procurement Services works with department to issue a formal solicitation, either an Invitation for Bid (awarded to low cost) or Request for Proposal (award based on cost and other criteria).
- Procurement Services receives bids/proposals and works with department to identify low bid or highest scoring offeror.
- Procurement Services issues Purchase Order or Contract to department approved offeror.