



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](http://www.montana.edu/wwwbu/procurementservices)



University Business Services **PURCHASING GUIDELINES**



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.

And complete any of the following that apply:

- 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.