We are here to help!

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Small group and departmental trainings available on request.

All forms and tools can be found on the Procurement Services website at:
www.montana.edu/wwwbu/procurementservices
START HERE:

**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 UIT 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 994-7508 or email ubshelp@montana.edu to discuss Independent Contractor requirements.
- Do NOT sign any vendor agreements without Procurement Services review.
- All copier purchases and leases must come through the Procurement Services office.
- If you have any questions, please contact Procurement Services PRIOR to placing an order or making a commitment to buy!
- Remember you are spending your tax dollars, as well as your friends, relatives, and neighbors! Spend wisely!

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

**Department may purchase.**

Purchases may be made from state term contracts without issuing a 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 UIT on any IT purchases.
- 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 box on left.

All procurement paperwork, along with invoices, must be attached to BPA or p-card reports for archival and auditing 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.

Email Purchase Requisition signed up to VP level and specifications to Procurement Services.

**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.
- Department selected evaluation committee independently reviews and scores RFP proposals.
- Procurement works with department to identify low bid or highest scoring offeror.
- Procurement Services issues Purchase Order or Contract to department approved offeror.

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**Base your purchase on total contract value.**

This includes the initial contract term, plus any renewals or options.