



**Small group and departmental trainings
available on request.**

We are here to help!

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All forms and tools can be found on the
Procurement Services website at:

**[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 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.