



Procurement Services Office  
Ikenberry Hall  
Room 217  
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## **Sole Source Purchases**

A sole source purchase is when an item or service is only available from one source. If a product is available from multiple distributors, it is not considered to be a sole source.

Requests for approval (Sole Source Form) as a sole source purchase must include a statement from requesting department stating what is unique about this product or service. (Why can no other company/item meet the department's need. Please list specifics.)

It is desirable to have a quotation from the sole source supplier if available.

## **Bid Process**

A requisition containing a description of the items and item technical specifications/requirements is typically the starting point for the bid/RFQ process. If the specifications are lengthy, the requisition may contain a general description of the item(s) to be bid and the detailed specification information can be sent as an attachment.

Specifications, in general, should be broad enough to foster competition in bidding and still meet the needs of the department. A brand, catalog number, or model number may be called out for each item but will typically be followed by the words "or approved equal" in the bid request documents. Companies submitting bids may bid on brands and models other than those listed but should in that case, also furnish descriptive literature that will allow the requesting department to evaluate the items to determine whether or not Shepherd University can approve them as equal.

A list of potential bidders is prepared by the Office of Procurement Services with suggestions from the requesting department. Bid requests are then prepared and transmitted to each of those potential bidders on the list. Bid due dates are established when the bid request is prepared and that information is included in the bid request documents. Bid requests are typically transmitted to potential bidders and bids are received from bidders

via fax. In those instances, the time from transmission of a bid request to bid date is usually 10 to 14 working days, but the nature and complexity of such bids may necessitate up to 20 working days or more. After bid requests are issued, and prior to due date, any inquiries received by the requesting departments from potential bidders should immediately be referred to the Office of Procurement Services.

At the bid due date and time, Procurement staff open the bids received, check the calculations shown by the bidders, review the bids for obvious potential problems, tabulate the bids in ascending order, and mail the bids along with the tabulation sheet to the requesting department. A bid award will be made to the bidder submitting the lowest price meeting specifications. Requesting departments indicate their recommendations for bid awards on the bid summary sheet that accompanies the bids and sends all bids and that sheet back to the Office of Procurement Services. In situations in which the requesting department recommends an award be made to a bidder that has not submitted the lowest bid, the department must provide detailed reasons on the bid summary sheet or attachment why the lower bid(s) does not meet the specifications of the bid request document. Usually, the sooner the bids are returned to the Office of Procurement Services, the fewer problems encountered in awarding bids due to changing prices, changing product lines, etc. Therefore, it is desirable that evaluations and recommendations be made and returned within approximately 7 working days whenever practical. The department's recommendations will be reviewed and if in agreement, the requisition is converted into a purchase order to award the bid. If there is not immediate agreement and/or it is judged that the proposed award could be successfully challenged in a formal protest, the requesting department will be contacted for clarification or further information.

Requesting departments should contact the Office of Procurement Services if problems are encountered with orders resulting from bids such as late delivery or proposed substitutions of brands and models.

## **Request for Proposal Process**

Requests for proposals, unlike bid requests, are used when there are various factors, in addition to cost, that will be evaluated when awarding a contract. With bid requests, the needed specifications are typically known and we are looking for a supplier who can meet those specifications at the lowest cost. With requests for proposals, we are typically looking for suppliers to propose various configurations of equipment or programs to meet our basic

requirements. The initiation and processing of requests for proposals is similar to that of bid requests with the exception of the evaluation.

During the preparation of the request for proposal the evaluation criteria are established as a result of discussions with a representative of the requesting department. An evaluation committee will be formed from various campus departments with interest in or knowledge of the proposal. A point system is established and each member of the committee will independently review and evaluate the proposal. Once the evaluations have been completed, the Office of Procurement Services and representatives from the requesting department will review the points awarded for financials (cost) and will calculate the respondent with the most points. The respondent with the most points and meeting mandatory requirements will be awarded the contract.

### **Bids/Proposals Posting**

In addition to advertising in local newspapers, bid requests and requests for proposals are available from the Office of Procurement Services and are posted on the bulletin board located in Ikenberry Hall. Some requests may also be available for download from the Bids page.

### **Professional Services**

Professional services require an agreement/contract – Contact the Office of Procurement Services for assistance. Do not pay on a Purchasing Card.

### **Purchases from Minority/Woman Owned Businesses**

Purchases from minority and/or woman-owned businesses are encouraged.