



WHEN QUOTES ARE NEEDED

AND HOW TO OBTAIN THEM

Understanding the process



When you need to obtain quotes, it is important to obtain the quotes before you proceed with a requisition. Quotes are needed to follow procurement rules and regulations.

The goal is to promote true competition that will get the best value for the county. Based on the dollar amount, an Invitation to bid (ITB) or Request for Proposal (RFP) and/or a contract may be needed.



For Goods, Equipment, Supplies and Materials, if the purchase is over \$10,000 you will need three (3) quotes, and either a contract or PO with terms and conditions attached.

For Services over \$10,000 and less than \$100,000 a contract and Purchase Order is required.

For Subscriptions and Equipment Leases over \$50,000, a contract and PO is required. Over \$50,000 an RFP is required.

For Construction/Public Work Projects less than \$100,000, a contract and PO is required. Over \$100,000 an ITB/RFP or request for qualifications (RFQ) is required along with a contract.

For amounts under the Formal Threshold, purchasing may elect to use a competitive purchasing method.

Procurement will monitor cumulative totals for the entire county. See Procurement Policy section 2.42 Cumulative Thresholds for more information.

Splitting orders to avoid obtaining quotes is prohibited under the Procurement Policy.

Failure to follow Procurement policy may result in disciplinary action, loss of purchasing privileges, and personal liability for purchases.

See Procurement Method and Contract Formation guidelines at:

www.utahcounty.gov/dept/clerk/aud/purchasing/purchaseemployeeforms.asp

You are encouraged to bookmark it for reference.

See next page for the guidelines.

PROCUREMENT METHOD AND CONTRACT FORMATION

All purchases are to be made in Utah County's best economic interest

Procurement needs to review the quotes before a request is approved.

If a contract will be required, work with Procurement before the request will be added to the agenda system to avoid delays.

Competitive Purchasing Requirements

Purchase Type	Informal Threshold	Informal Method	Formal Threshold	Formal Method	Required Contract Documents
Goods, Equipment, Supplies, Materials	More than or equal to \$10,000	3 Quotes	More than or equal to \$50,000	ITB	Purchase Order (PO) with terms and conditions or a contract
Services	Less than \$100,000	N/A	More than or equal to \$100,000	RFP/RFQ	Contract (if over \$10,000) and PO
Subscriptions, Equipment Leases	Less than \$50,000	N/A	More than or equal to \$50,000	RFP	Contract (if over \$10,000) and PO
Construction/Public Works Projects	Less than \$100,000	N/A	More than or equal to \$100,000	ITB/RFP/RFQ	Contract and Purchase Order

All quotes should be documented in writing and included with the Purchase Requisition. Responses must contain, at a minimum, the following:

- a. Contact Date
- b. Description of goods, equipment, or services.
- c. Unit Price
- d. Name of vendor and their contact information.
- e. If using a Procurement approved contract, quote must reference the contract number.

The County currently uses four main ways of obtaining quotes:



1. A county employee reaches out vendors to obtain written quotes.



2. A county employee works with Purchasing to use Get-A-Quote on the state purchasing website. Once posted the vendors respond to you within the specified time frame.



3. A county employee works with Purchasing to use the GovSpend (GovQuote) platform. Once posted the vendors respond within the specified time on the platform.



4. There are other co-ops the county uses; you will need to contact Purchasing to obtain quotes from the co-ops.

Responsibilities for record keeping on quotes

If you reach out to vendors to obtain quotes, you are responsible to keep all the paperwork (responses) and attach them to the request.

If you call, e-mail or research on their website, you are responsible to document how the process was fair and transparent. See prior page for minimum information required.

Finding the product online that you want, and then searching for the same thing at a higher price is **Not** a legitimate method for obtaining quotes. You should use a reasonable amount of effort to obtain truly competitive quotes.

If you use the electronic platform GovSpend, the vendor responses are recorded and can be audited with a quick review. Results can be exported. You will need to document on the requisition that you used GovSpend to obtain quotes.

If you use Get-A-Quote through State Purchasing, the vendors will respond by e-mail, and you will need to keep copies of the responses. You will need to also attach the e-mail responses to the requisition to document the process. Procurement can post the request on Get-A-Quote and will maintain the records for you.