

LIMITED SOLICITATION

Limited Solicitation permits a department to make purchases between \$5,000 and \$15,000 with only limited competition. This option is designed to be an intermediate step between “small purchase” procedures and the formal Invitation for Bid or Request for Proposal. A second objective of limited solicitation is to increase efficiency by allowing departmental staff to process most of their own procurements.

This method does not apply to controlled items, items purchased through term contracts, or printing unless specifically provided in the University’s delegation agreement.

Complete Limited Solicitation documentation shall be maintained in the individual Department files.

Limited Solicitations must be approved by Business Services-Purchasing prior to purchase. Sole source documentation must be provided to, and approval must be obtained from, Purchasing prior to the limited solicitation purchase.

The Limited Solicitation procedure requires a minimum of three written/fax quotations. The limited solicitation procedure must be documented using the limited solicitation form, the limited solicitation summary sheet, and a copy of the bid specifications provided to the vendors; and wherever practical, use the State of Montana’s central vendor list. Note: bids obtained must for the exact same item(s) in the exact same quantities to be ordered.

All purchases must be FOB: The University of Montana. Shipping/freight costs are exempt from the \$15,000 – shipping costs will be considered separate from the cost of the product(s).

State of Montana – Vendors List:

<http://www.discoveringmontana.com/da/gsd/OLBL/Default.asp>

State of Montana – Statutes, Rules and Policies:

<http://www.discoveringmontana.com/da/gsd/procurement/procurementlawrulespolicies.asp>

The University will be unable to pay invoices until a completed IRS W-9 form has been received in Business Services. It may be faxed to: 406-243-4929.

Here is the web link to the W-9 form:

<http://www.irs.gov/pub/irs-pdf/fw9.pdf>

LIMITED SOLICITATION SUMMARY SHEET

(FOR PURCHASES BETWEEN \$5,000 - \$15,000)

Department:	Date:	F.O.B:	
Requestor:			
Please Print		Requestor Signature	
ITEM DESCRIPTION/SPECIFICATIONS - BRAND/MODEL:			
REQUIRED DELIVERY DATE:			
	VENDOR #1	VENDOR #2	VENDOR #3
VENDOR NAME/ADDRESS:			
CONTACT PERSON:			
PHONE/FAX:			
FEDERAL ID#:			
TOTAL QUOTE PRICE:	\$	\$	\$
AWARDED TO PO#:	YES: PD#:	YES: PD#:	YES: PD#: