

# Quote Guide

## Overview:

In order to process a quote correctly, you must:

1. Check your budget
2. Complete a quote form
3. Include specifications that will be sent to all vendors (the specifications sent to each vendor must be identical for each quote)
4. Include all of the individual quotes submitted by the vendors based on threshold [no telephone bids are allowed]
5. Submit a contract to the Procurement Office with all quotes attached with the lowest bidder awarded.

Contractor Thresholds	Quotes Required
Up to \$5,000	One
\$5,000.01- \$50,000	Two
\$50,000.01 - \$75,000 (Professional/Personal Services)	Three
Over \$50,000 (Commodities, Equipment, Furniture)	Advertise

## Rules of Ethics:

The following rules of ethics govern all quotes:

1. Program Office staff shall ensure that their Program Office is in compliance with all applicable MDE policies (including, but not limited to, the Code of Conduct and Conflict of Interest policies), and Program Office staff shall frequently review all applicable policies.
2. Program Office staff shall conduct business with potential and current vendors in an atmosphere of good faith.
3. Program Office staff shall promote honest and positive relationships with vendors by being courteous and impartial.
4. Program Office staff shall give all vendors who submit responses fair and equitable consideration.
5. Program Offices must give all vendors for each quote the same information. Program Offices shall not engage in giving a particular vendor or vendors "insider information" (i.e. information that is not shared with all vendors).
6. Program Office staff shall not:
  1. inform a bidder that they are the lowest bidder or the winning bidder;
  2. discuss other vendors' responses with any other vendor;
  3. communicate the results with vendors;
  4. share a vendor's information, communication, or bid response with any other vendor;
  5. notify any vendor of the award.

## Rules:

The quote process is allowed for purchases established above. Program Offices should not use quotes to obtain:

- professional or personal service contracts that include technical factors.

The Program Office submitting the quote is required to provide written documentation detailing the quote process.

Program Offices may use the quote process for formal quotations only. Program Offices shall not submit informal requests for proposals.

1. All MDE fiscal policies apply. Program Offices should refer to relevant policies before starting a quote.
2. When interacting with vendors, you must make it clear that you are seeking quotes only, and that you cannot make a binding commitment.
3. You must send vendors the "Request for Quote Form" and require them to complete the form and email it back to you.
4. If something is a factor in your bid, you must mention it in your bid.
  1. Examples:
    1. i. If you are seeking bids on goods, and you want to take the vendors' warranty into consideration, you must mention this in your specifications.
    2. ii. If delivery date is a consideration, you must list that in your specifications.
  2. Program Offices may not solicit bids for services that require a contractor's license, insurance, or performance bonds, this is a contractual process.
5. Program Offices shall not split bids in an effort to be below the applicable threshold.
6. If delivery time is a factor in the award, then Program Offices must communicate this to the potential vendor.
7. Program Offices shall not falsify or manipulate a vendor's bid response details.
8. Program Offices shall develop sufficiently clear specifications to define what goods and services that are being sought. Program Offices must permit competition between products of equal quality.
9. Program Offices must write specifications in an objective manner.
10. Bids obtained from vendors and submitted to the Office of Procurement must be for the same specifications.
11. Program Offices shall not modify the specifications after sending the specifications.
12. Program Offices must require vendors to include in the vendor's response all possible costs involved in the vendor's good or service (for example, delivery, installation, etc.).
13. Program Offices are encouraged to obtain quotes from Mississippi businesses, small and minority-owned businesses, and should do so whenever possible.
14. Program Offices' quote requests must be in writing (email, fax, or letter). The MDE encourages Program Offices to use email, as this reduces costs and increases the efficiency and effectiveness of the quote process.
15. Telephone bids and website screen-shots are not acceptable.
16. If a Program Office seeks quotes on used or refurbished equipment, the Program Office must also obtain quotes on new equipment.

17. If a Program Office seeks quotes on leasing an item, the Program Office must seek a quote on purchasing the items.
18. Program Offices must ensure that a vendor number is created before the Office of Procurement issues an award to the winning bidder.
19. In the event that a Program Office wants to award to a bidder who is not the lowest bidder, the Program Office must provide ample justification with the bid form.
20. The Program Office may not share any bid information submitted from any bidder to anyone other than the Procurement Office.
21. Program Offices may never share bid information from one bidder to another bidder.
22. Program Offices shall not notify a bidder that the bidder won without the approval of The Office of Procurement.

The Office of Procurement will review bids and may request additional information before the issuance of an award and purchase order.