**Quote Guide**

**Overview:**

In order to process a quote correctly, you must:

1. Check your budget
2. Complete an MDE 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 thresholds below [no telephone bids are allowed]
5. Submit a contract request packet to the Procurement Office with the MDE quote form and all quotes attached with the lowest bidder awarded.

**Rules of Ethics:**

The following rules of ethics govern all quotes:

* 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 and procedures.
* Conduct business with potential and current vendors in an atmosphere of good faith.
* Promote honest and positive relationships with vendors by being courteous and impartial.
* Give all vendors who submit responses fair, competitive and transparent consideration.
* All vendors must obtain the same information.
* Do not engage in giving a particular vendor or vendors “insider information” (i.e., information that is not shared with all vendors).
* Program Office staff **shall not**:
	1. contact a potential vendor to obtain specifications and submit a response for an award.
	2. inform a bidder that they are the lowest bidder or the winning bidder prior to completing the award;
	3. **discuss** other vendors’ responses with any other vendor;
	4. communicate the results with vendors;
	5. **share** a vendor’s information, communication, or bid response with any other vendor;
	6. notify any vendor of the award prior to completing the award.

**Rules:**

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

* complex scopes of work that include technical factors. The lowest responsive bidder receives the quote, no exception.

The Program Office submitting the quote is required to provide a packet that supports detailing the quote process.

Program Offices may use the quote process for formal quotations only. Program Offices shall not submit informal requests for proposals. Please use the **Request for Information** process for this type of vendor request.

1. All MDE fiscal policies apply. Program Offices should refer to relevant policies or request consultation before starting a quote process.
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 “MDE Request for Quote Form” and require them to review the form, follow instructions, and email a response bid back to you.
4. If something is a factor in your bid, you must include in your request for quote.
	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 in the specifications.
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 unless an amendment is issued.
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, shipping, 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 to the vendor must be in writing (email 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, fax, 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 supplier number is created in MAGIC before the Office of Procurement receives a packet for processing an award.
19. The Program Office may not share any bid information submitted from any bidder to anyone other than the Procurement Office.
20. Program Offices shall not notify a bidder that the bidder has the winning bid 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 official award notice and purchase order.