



Policy 03:020 – Purchasing from Outside Vendors

All materials, supplies, equipment or services from outside sources necessary for departmental operation are acquired either through direct purchase or as gifts to the University. Direct purchase or lease of goods and services by the University must conform to this policy. Goods and services accepted as gifts to the University are handled through the University of Montevallo Foundation.

Materials, supplies, equipment or services should be requisitioned only when University funds have been appropriated or transferred from the University of Montevallo Foundation, and are available for such purchases. All purchases and leases must be for official University use or benefit and must support the University's mission. The requisitioning department is responsible for determining the necessity of items to be purchased or leased.

Bidding Policy

The following bidding policies apply to goods and services acquired from outside vendors:

1. Purchases of \$75,000 or less. Purchases, leases and rentals of goods or services of \$75,000 or less per fiscal year may be made by departments based on their discretion. Vendor selection should be based on informal competitive price quotations that may be obtained in writing, by email, or by telephone. The department should maintain documentation of such quotations.
2. Purchases greater than \$75,000. Purchases, leases and rentals of goods or services greater than \$75,000 per fiscal year must be made on the basis of competitive prices by soliciting written sealed bids from qualified vendors. A public opening of the bids received will be held at the time and date specified on the bid solicitation request. The Purchasing Office is responsible for soliciting, receiving and opening the sealed bids, as well as maintaining the official public file after award of the sealed bids.

The requisitioning department is responsible for documenting specifications for the goods and services to be purchased. Whenever possible, specifications for goods and services should be worded to permit open and competitive bidding. The requisitioning department is also responsible for reviewing sealed bid responses and providing justification for selection of the successful bidder.

Sole-Source and Proprietary Purchases

Sole-source Products or Services. A sole-source product or service is unique and possesses specific characteristics that can be obtained from only one source. When a requisitioner specifies a sole-source, proprietary, or other non-biddable product, the requisition must be accompanied by a written justification and receive the approval of the Vice President for Business Affairs or designee. Classification of a product or service as sole source is based on the following criteria:

- The vendor possesses exclusive and/or predominant capabilities, or the item contains a patented feature not obtainable from similar products.
- The product or service is unique and easily established as one of a kind.
- The program requirements cannot be modified to use competitive products or services.
- The product is available from only one source and not merchandised through wholesalers, jobbers or other retailers.
- The product must be interchangeable or compatible with existing products.

Proprietary Products or Services. A proprietary product or service is manufactured, marketed or provided by a person or firm with exclusive rights to manufacture, perform or sell the product or service. Bids as specified in this policy are required when proprietary products or services can be obtained from different franchised vendors.

Purchases from Existing Contracts with Vendors

State Contracts with Vendors. The University participates in the State's contract buying system that establishes contracts with selected vendors for a wide range of commodities. Purchases made from State contracts do not require competitive bids.

University Contracts with Vendors. The University has established term contracts for a limited variety of supplies and services. These items are generally used in volume (e.g., paint) or are of a special nature or market situation requiring a contract (e.g. computers, computer parts). Individual purchases under such University contracts may not have to be bid since vendor selection for these contracts is based on bid results. A list of items covered under such contracts is available in the Purchasing Office.

Purchases not Requiring Bidding

Contracts for professional services (e.g., attorneys, physicians, architects, accountants, engineers, construction managers, etc.) are, by State law, exempt from mandatory bidding.

The University of Montevallo is also authorized to utilize all State of Alabama and consortium contracts when it is advantageous.

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