

## Simplified Bid Process

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### Procedure Summary

The Simplified Bidding process is necessary when the estimated cost of a supply, service (except printing), or equipment is greater than \$5,000 but less than \$50,000, and there is no established contract for that commodity/service. Three solicitations are required with one of those being from a Minority Business Enterprise (MBE). If an MBE is not available in the commodity area, you must make note of it on the Simplified Bid Summary Form. In addition to making a note of it on your summary form you should attach a screen shot from the MBE website that shows there are no MBEs for this commodity/service.

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### Rationale

State of Wisconsin Procurement Procedures must be followed for all procurements.

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### Responsibilities

All University personnel involved in soliciting bids are responsible for compliance with the laws, administrative rules, and regulations of the State of Wisconsin, UWSS Procurement Procedures. They must also abide by the UWSS Code of Ethics.

See website: [Code of Ethics Policy](#)

**Confidentiality of Bids:** UW-Parkside personnel must be careful not to give one vendor an advantage by inadvertently sharing another vendor's prices, terms, or other bid information during the course of the bidding process. Only information needed to clarify a specification and prepare a bid may be given out and made available to all vendors. Vendors may ask to be notified of the bid results. Departments are not authorized to release this information until after the purchase order (PO) has been issued.

**Insurance:** Insurance coverage will be required from the successful bidder for service, installation, inside delivery and other work performed on campus. It is imperative that this requirement be made known to the supplier as part of the bid specification.

**MBE:** Whenever possible, a minimum of one MBE must be requested to bid. For additional information on the MBE program see: [Supplier Diversity Program](#). To search for an MBE see: Department of Administration [DOA MBE Directory](#).

When other campus departments or other government agencies are considered viable vendors, they should be contacted and considered **prior** to any competitive bidding procedure, not contacted nor considered currently.

All documentation should be attached to the PO request, along with the specifications, copies of all quotes and Simplified Bid Summary Sheet. All documentation should be sent thru workflow to Procurement for review, final approval, and releasing of the PO. Only Procurement may authorize the actual purchase. The department does not have the authority to place an order until they receive their copy of the PO. All information on the bid summary form must be completely filled out and all documentation attached, the PO request will be pushed back to the requestor if any information is missing and will delay in the PO being issued.

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### Who This Procedure Applies To

This procedure applies to all University staff looking to purchase a commodity or service not available on an established contract where cost is greater than \$5,000 but less than \$50,000.

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### Procedure Detail

The Simplified Bid Process may be performed by departments or by Procurement. Identical specifications must be sent to all vendors. Departments will submit the results of the simplified bid with the suggested awarded vendor to Procurement. All simplified bidding performed by departments will be subject to review by Procurement, which may elect to solicit additional bids to assure the requirement for competitive bidding has been met. The award is based solely on the lowest cost responsive, responsible bidder. The official award will be made by Procurement.

Simplified Bidding is not intended to circumvent other appropriate purchasing procedures. Mandatory State Contracts must be used unless prior approval is obtained through Procurement.

UW-Madison and UW System (UWS) have non-mandatory contracts available for department convenience and savings. See website: [Procurement Contracts](#). Search by either keyword or vendor to find if a contract exists.

**Usage:** Price quotes must be obtained from three or more viable vendors (and a Minority Business Enterprise should it apply) who are normally expected to carry or provide the commodity/service. Always indicate that you are requesting quotes for the University. If acquiring a service which involves installation, inside delivery, or other work performed on campus, be sure to inform the vendor that a certificate of insurance will be needed if they are the selected vendor.

Price quotes may be obtained through the following methods: current price lists, advertisements, telephone or verbal quotes, facsimile quotations, e-mail quotes, written bids, or previous quotes on file. Vendors contacted for price quotes must be documented and copies of the quotes obtained in writing.

**Minority Business Enterprise (MBE):** When conducting a simplified bid, a minimum of one MBE must be requested to bid. If an MBE is not available in the commodity

area, you must make note of it on the Simplified Bid Summary Form. In addition to making a note of it on your summary form you should attach a screen shot from the MBE website that shows there are no MBE's for this commodity/service. For additional information on the MBE program see: [Supplier Diversity Program](#). To search for an MBE see: Department of Administration (DOA) [DOA MBE Directory](#).

When comparing bids/quotes, the following elements must be considered: price (discount), conformity with ORIGINAL specifications, delivery date (if specified), freight charges, and special 5% preferences (MBE, etc...).

**Alternate Bids:** If vendors submit bids for product or service different from that specified, a determination must be made if the alternate item is an equal substitution. The vendor must provide sufficient product information for the user to evaluate the alternate item. Specifications must be clear and detailed enough to identify the products or services needed. Specifications that are not clear enough may result in products not meeting the needs of the department and may require re-bidding.

Using previous quotes on file: if the awarded vendor from a recent bid agrees to hold to the same pricing and if this pricing is still to University advantage, then bidding does not need to be repeated.

All documentation should be attached to the Purchase Order (PO) request along with the specifications, copies of all quotes and Simplified Bid Summary Sheet. All documentation should be sent thru workflow to Procurement for review, final approval, and releasing of the PO. Only Procurement may authorize the actual purchase. The department does not have the authority to place an order until they receive their copy of the PO. All information on the bid summary form must be completely filled out and all documentation attached, the PO request will be pushed back to the requestor if any information is missing and will delay in the PO being issued.