



3.2.4.4 Request of Quote (eSource)

Policy Statement

eSource is the mandatory electronic bidding system that must be utilized for all requests for quotes unless State Purchasing grants an exception. eSource is not typically utilized for the following types of purchases:

- 1) Purchases to be conducted through request for proposals (RFPs)
- 2) Purchases for construction/public works service projects
- 3) Sole source procurements (never utilizes eSource; however, requires posting to the Georgia Procurement Registry (GPR))
- 4) Exemptions as stated on the National Institute of Governmental Purchasing (NIGP) exempt list (located at http://doas.ga.gov/StateLocal/SPD/Docs_SPD_General/nigpexemptlist.pdf)
- 5) Exemptions as stated in Table 1.6 of the Georgia Procurement Manual (shown below)

Category
Emergency supplies of drugs, chemicals and sundries; dental supplies and equipment.
Livestock for Slaughter.
Perishable Articles such as Fresh Vegetables, Fresh Meat, Fish & Oysters, Butter, Eggs, Poultry & Milk.
Technical Books & Other Printed Matter on Technical Subjects.
Other Items (such as works of art) which have been specifically identified by SPD in the Exempt Good/Services by <u>NIGP™ Code</u> identified in Section 1.2.4. - Exempt Goods/Services by NIGP™ Code.
Technical Instruments and Supplies.

*Please note the table may be modified at any time by State Purchasing. Procurement is responsible for making the final determination for #4 and #5 listed above in "Policy Statement".

Reason for policy

To provide an understanding of the eSource RFQ process which is mandated by State Purchasing and requires the use of the eRFQ template.

Procedures

The department/end-user requesting the purchase is responsible for drafting bid specifications. The procurement specialist will then review the specifications to determine if any modifications or additional information is needed to complete the specifications. Once the specifications have been clarified and completed, Procurement will then post a bid to the eSource system. The posting periods for eSource bids is determined by the dollar amount of the submitted purchase request. The following table contains the current posting requirement:

Table 3.5 Public Posting Guidelines		
If the Estimated Contract Value is...	Then, the RFQ Posting Period is...	10 Day Notice of Intent to Award (NOIA)
\$25,000 - \$99,999.99	Minimum of Three (3) Business Days	Not required
\$100,000 - \$249,999.99	Minimum of Five (5) Business Days	Required
\$250,000 or more	Minimum of Fifteen (15) Calendar Days (mandated by Georgia law)	Required

*Please note the table may be modified at any time by State Purchasing.

The Procurement Office reserves the right to determine if the bid is to be posted for a longer time frame than the minimum guidelines in Table 3.5. This is usually determined by considering the complexity of the procurement/bid, the time it would take for a vendor to be able to completely review the bid and ask questions, and the time it would take for the University to provide responses to those questions. Also, if a pre-bid conference would be beneficial to the University, the procurement staff must schedule any such public meeting to occur no less than seven business days prior to the bid closing date. The University is not required to offer a pre-bid conference for every bid.

Upon the closing of the bid, procurement staff will evaluate responses to determine responsibility, responsiveness, and pricing. If the awarded dollar amount is \$100,000 or greater, a Notice of Intent to Award is posted for 10 calendar days and Department of Revenue approval must be obtained prior to the purchase order being issued. If the dollar amount is less than \$100,000, no Notice of Intent to Award is required. An award is then provided to the winning bidder from the Procurement Office via a purchase order.

Forms/Instructions

Additional contacts

Procurement Office Staff 706-542-2361

Policy definitions

1) Request for quote (RFQ) – a method of competitive purchasing where award is made to the lowest, responsive, and responsible vendor(s) in accordance with stated award criteria. Whether a vendor may be considered “responsive” and “responsible” will be determined on a case-by-case basis after considering any specific issues and their relevance to the procurement in question. The term “bid” is equal to RFQ in this policy.

- 2) Responsive means the vendor, whether a company or an individual, has submitted a timely offer which materially conforms to the requirements and specifications of the bid.
- 3) Responsible means the vendor, whether a company or an individual, has appropriate legal authority to do business in the State of Georgia, a satisfactory record of integrity, appropriate financial, organizational and operational capacity and controls, and acceptable performance on previous governmental and/or private contracts, if any. Examples of non-responsible vendors include, but are not limited to, a bidder's history of nonperformance or performance problems on other contracts (public or private), a record of financial difficulty, business instability, criminal sanctions, civil sanctions, and/or tax delinquency. As noted above, non-responsibility will be determined on a case-by-case basis taking into consideration the unique circumstances of the individual procurement.
- 4) eSource is a software technology permitting Request for Quotes to be conducted online. Vendors responding to electronic Request for Quotes ("eRFQs") hosted by eSource are permitted to logon, enter a response per line item, enter a response of "no bid" per line item, and attach/upload documents to the bid response until bid closing. eSource simplifies the bidding process by enabling electronic responses, reducing paper documents received, and automating the cost evaluation process.
- 5) Notice of Intent to Award is a form identifying the intended contract award to the apparent successful bidder(s)/offeror(s), the names of all bidders/offerors whose bids/proposals were rejected, and the reasons for rejection of the unsuccessful bidders/offerors. The Notice of Intent to Award is publicly posted before a contract award is made. (Notice of Intent to Award is only required of procurements of \$100,000 or more.)

Responsibilities

Responsible University Senior Administrator: Vice President for Finance & Administration

Responsible University Administrator: Procurement Officer

Policy Owner: Procurement

Policy Contact: Annette Evans

Phone Number: 706-542-2361

Responsibilities: *Procurement is responsible for issuing RFQs. Upon receipt of bid responses, it is Procurement's responsibility to evaluate and determine bidders' responsive and responsible status with the assistance of the requesting department.*

Responsibilities: *It is the department's responsibility to draft the original bid specifications. Once the specifications have been reviewed by the Procurement Office, it is the department's responsibility to work with the buyer in making revisions to specifications.*

Record Retention

Records may include but are not limited to: purchase requests; purchase orders; supplies, and services; and related documentation and correspondence.

Record Copy: Procurement

Retention for purchase order files may vary by the method of purchase and the products/services being purchased.

Retention: 11 years or 7 years, BOR 072-03-009; BOR 0472-14-002

Related information

Date Reviewed: 02/01/2018

[< Request for Proposal \(RFP\) | Purchase Request Preparation >](#)

Policy Dates

Effective Date: 01/01/2016

Date Last Updated: 02/01/2018

Date of Last Review:

Date of Approval:

Previous Version of Policy: