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# Quote Process

Purchasing Department • 07.09.2019

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# New Quote Process

Arizona Revised Statutes §15-213 and the Office of the Auditor General establish specific guidelines for purchases in excess of \$10,000 in aggregate by like items and vendor.

- More than \$10,000 but less than \$100,000 - written quotes
  - More than \$100,000 – formal solicitations (IFB or RFP)
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# How the Changes Affect You

Beginning with fiscal year 2019-20,  
verbal quotes are no longer  
acceptable, per the Auditor General.

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# How the Changes Affect You

The new process for purchases \$10,000 - \$50,000 is:

- Quote Summary Form (Excel)
  - 3 written quotes from vendors (vendor names must appear on quotes)
  - Attach completed Quote Summary Form and all 3 quotes to your requisition.
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# Quote Summary Form

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- The form is located on the Purchasing web page Staff > Purchasing > For FORMS, click here.
  - Clicking on the “Quote Summary Form” link opens the form.
  - Download it to your desktop.
  - As you fill out the Quantity and Unit Price, the Extended Price and Grand Total will automatically calculate.
  - The lowest Grand Total will automatically highlight.
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# Contacting Vendors

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- All vendors must be provided with identical information regarding the item you wish to purchase.
  - The best way to do this is to send all 3 vendors the same email.
  - Send the email to yourself, and **BLIND COPY** all vendors so they cannot see the other vendors email addresses.
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- You must contact vendors that you would reasonably expect to offer the goods or services you're quoting.
  - You must allow sufficient time before the purchase will be made and you must provide adequate detail to allow vendors to respond effectively.
  - Online pricing, shopping carts, etc. DO qualify as quotes. Vendor's name must appear on their quote document (letterhead, URL, email signature block, etc.).
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**What if?**

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# What if . . .

...my purchase is under \$10,000?  
Why do I have to get quotes?

We have to look at the District as a whole when considering procurement thresholds and procedures. Another school (or schools) may have already purchased from this vendor during the same school year, and your purchase added to theirs pushes the collective total to more than \$10,000.

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# What if . . .

. . . factors other than price are awarded?

If a vendor is selected because of factors other than lowest price, the reasons must be fully documented and retained with the price quotations.

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# What if . . .

... I can't get three quotes?

Document your efforts. If you contacted vendors that had reasonable opportunity to quote, auditors will accept the fully documented “no quotes” as meeting the requirements.

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# What if . . .

. . . I can only get one quote?

If reasonable documented effort to obtain three quotes has been made, but only one quote was obtained, include documentation explaining why it is advantageous to the school to award to the vendor.

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**Purchasing can help!**

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This process may evolve over time.

Purchasing is here to help you.

Don't hesitate to call on us for resources or with questions.

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**Call Purchasing  
with any  
questions.**

Lari Staples - 7010

Cheryl James - 7898

Tamie Jones - 7996

Purchasing Technician - 7037

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