

Workforce Solutions of Central Texas
MICROPURCHASE and COOPERATIVE PURCHASE QUOTATION FORM

For purchases < \$3,000: Complete information for Vendor as a Cover Sheet.
Sign the form and the receipt, have Director/Designee sign off approving the purchase, and attach receipt.

Cooperative Purchase using TXMAS, DIR, SMART BUY, TCPN, BUY BOARD, other:
Only one bid is needed for any purchase < \$150,000
but still needs prior Fiscal Review and Board Director Approval if ≥\$3000

I. Goods or Services and Justification for Purchase:

For Office and/or department: _____

II. Effective Date (if applicable): Begin _____ End _____

	Vendor
Vendor Name	
Vendor Contact Information (address, phone, website)	
Quotation Amount	
Shipping & Handling	
Total Amount w/S&H	
Time Available at Quoted Amount	
For Purchase < \$3000 How do you know it's a Reasonable Price? Must check at least one.	<input type="checkbox"/> Based on Research <input type="checkbox"/> Based on Experience <input type="checkbox"/> Based on Prior Purchase <input type="checkbox"/> Other Information (explain) See definitions on back.
Cooperative Purchase TXMAS, DIR, SMART BUY, TCPN, BUY BOARD, other	Include identifying Coop number

III. Staff Member Requesting Goods or Services:

IV. Quotations solicited by: Signature: _____ Date: _____

V. Director/Designee's Approval: Signature: _____ Date: _____

TYPE OF PURCHASE: ☐ Credit Card # _____ (last 4 digits) ☐ Vendor Will Invoice ☐ Hold Check

FORWARD TO PURCHASER: ☐ Already Purchased ☐ Prepare Purchase Order/Contract

Fiscal Staff Review: Signature: _____ Date: _____

Board Purchaser: Review for Completeness: Initials: _____ Date: _____

Board Director/Designee Approval: Signature: _____ Date: _____

Board Purchaser: Packet Scanned to File: Initials: _____ Date: _____

SPECIFIC INSTRUCTIONS. The attached Purchase Quotation Form will be used by Board and Contractor staff as a cover sheet for all Micro and Cooperative Purchases. It will be used for:

1) Single bid purchases < \$3000.

- a) *NOTE: This form is required regardless of amount < \$3000 and regardless of whether purchased in-store or ordered.*
- b) Complete Lines I and II. Include justification for purchase.
- c) Complete Vendor column, checking the appropriate box under Reasonable Price. "Reasonable" mean suitable, just, proper, ordinary, fair, usual. The term is generic and relative and applies to that which is appropriate for a particular situation. The State Financial Manual for Grants and Contracts notes that "reasonableness" may be determined:
 - Based on Research: internet search, review of catalogs, phone calls, etc.
 - Based on Experience: education and work or personal experience has provided knowledge of a reasonable cost of this product or service.
 - Based on Prior Purchase: this item has been purchased within the last year and the cost is similar.
 - Other Information (explain): any other information that provides reasonableness of cost. Explanation has to be written on the form.
- d) Fill in Line III.
- e) Sign the form on Line IV; then have an authorized supervisor sign on Line V.
- f) Note the type of purchase.
- g) Note whether item has already been purchased or if vendor will invoice. Attach receipt if already purchased.
- h) Forward to Purchaser/Mary Duke in the Belton Office. Request a Purchase Order/Contract if needed.
- i) When goods or services are received, forward packing slip, agenda, sign-in sheets, or other proof of receipt to Yolanda Rodriguez in Belton Office so payment can be made.

2) Special Purchases < \$150,000: Cooperative buying through TXMAS, DIR, SMART BUY, BUY BOARD, other.

- a) *NOTE: Procurement has already been completed at the State level for these special purchase systems. These special purchases still follow the dollar amount guidelines (<\$3000, ≥\$3000 but < \$150,000) regarding prior approval.*
- b) Complete Lines I and II. Include justification for purchase.
- c) Complete Vendor column.
- d) Skip the Reasonable Price box (not applicable).
- e) Fill in the last box to indicate which special purchase system was used.
- f) Fill in Line III.
- g) If amount < \$3000, continue processing as above.
- h) If amount ≥ \$3000 but < \$150,000: Complete Lines III--IV, obtain authorized supervisor signature on Line V, and attach supporting documentation of the Special Purchase pricing.
- i) Send to Purchaser/Mary Duke in the Belton Office to obtain Fiscal Staff Review and Board Director Approval prior to purchase.
- j) When goods or services are received, forward packing slip, agenda, sign-in sheets, or other proof of receipt to Yolanda Rodriguez in Belton Office so payment can be made.

GENERAL INSTRUCTIONS.

- 1) Include Shipping and Handling costs when preparing the cover sheet. This can add significant costs to the item being purchased.
- 2) If the Micro Purchase is for an item that is used on an ongoing basis, consider preparing a bid that will cover a one-year period, for example, July 1, 2016—June 30, 2017. You may then use that cover sheet during the whole year rather than preparing a new cover for each purchase, as long as the total for the year is < \$3000. On the cover, show the cost for the whole year and note the effective date, begin and end. Do not exceed one year. Examples: quarterly pest control services, key & lock services, monthly air filter services.
- 3) **SPECIAL NOTE:** Any purchase ≥ \$100,000 must go before the Board for approval as part of WSCT Fiscal Integrity policy. This includes a Cooperative Purchase.
- 4) **TAX EXEMPT:** Central Texas Workforce Board dba Workforce Solutions of Central Texas is a tax-exempt organization. Contact Yolanda Rodriguez or Mary Duke for our Tax ID Number or a Tax Exempt form.