

**Workforce Solutions of Central Texas
SMALL PURCHASE 3-BID QUOTATION FORM**

For purchases $\geq \$3,000$ but $< \$150,000$:
Three Bids and Prior Fiscal Review and Board Director Approval are required prior to purchase.
Supporting documentation must be provided.

I. Goods or Services and Justification for Purchase:

For Office and/or department:

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

	Vendor #1	Vendor #2	Vendor #3
Vendor Name			
Vendor Contact Information (address, phone, website)			
Quotation Amount			
Shipping & Handling			
Total Amount w/S&H			
Time Available at Quoted Amount			

III. Vendor selected:

IV. Justification for Selection:

V. Staff Member Requesting Goods or Services:

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

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

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

SEND TO: ☐ Purchaser: 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 Small Purchase 3-Bid Quotation Form will be used by Board and Contractor staff as a cover sheet for all Small Purchases. It will be used for:

- 1) **Competitive bid purchase \geq \$3000 but $<$ \$150,000. Must be approved prior to purchase.**
 - a) Complete Lines I and II.
 - b) Complete all three Vendor columns, including all information.
 - c) Complete Lines III—IV. Justification for Selection might include lowest price, availability/delivery of product in timely manner, quality of product, quality of services, follow-up services included, etc. Remember that lowest price is NOT the only consideration in most cases, although it is important.
 - d) Complete Lines V and VI, then obtain authorized supervisor signature on Line VII.
 - e) Attach supporting documentation of the three bids. This may include quotes from vendors, copies of catalog pages, print-outs of webpages.
 - f) Send to Purchaser/Mary Duke in the Belton Office to obtain Fiscal Staff Review and Board Director Approval prior to purchase.
 - g) Once approved, Mary Duke will advise that purchase may proceed. She will issue a Purchase Order if necessary or request a Contract be drawn up.
 - h) 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 3-Bid Quotation Form. This can add significant costs to the item being purchased.
- 2) If the Small 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 $<$ \$150,000. On the cover, show the cost for the whole year and note the effective date, begin and end. Do not exceed one year. Examples: presenters for workshops planned, repetitive purchases planned where prices do not fluctuate.
- 3) **SPECIAL NOTE:** Any purchase \geq \$100,000 must go before the Board for approval as part of WSCT Fiscal Integrity policy.
- 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.