

BID REQUIREMENT/SOLE SOURCE

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DIVISION WITH PRIMARY RESPONSIBILITY: Business and Finance

OFFICE FOR ENSURING COMPLIANCE: Financial Services/Procurement

CONTACT OFFICE: Procurement, procurement@loyola.edu

EFFECTIVE DATE: May 2, 2016Fier@J[ent

To ensure objectivity and eliminate unfair competitive advantage, suppliers/vendors who participate in the development or drafting of specifications, requirements, requests for quotes or proposals must be excluded from competing for such purposes.

To avoid potential conflicts of interest, no employee, officer, or agent of the University should participate in the selection, award, or administration of purchases or contracts in which, to his or her knowledge, the employee, immediate family, or partner has a financial interest in the supplier's organization.

The University reserves the right to reject any bids, waive informalities and award the contract in the best interests of the University.

1. Competitive Bid Requirements

The following guidelines have been established to promote competitive bidding. Requestors should realize that these are minimum requirements and that bids should be solicited, whenever the goods or services can be purchased from several different, responsible suppliers.

a. Purchases up to and including \$9,999.99

d. Sole Source Purchases

A sole source purchase is one where a good or service can only be purchased from a single source. This situation makes it impossible to obtain competitive bids. The purchaser shall furnish documentation to justify why the technical characteristics inherent in the good or service make it essential to purchase from a single source. Some examples of appropriate justification for sole source purchases include, but are not limited to:

- Supplier holds a proprietary process or license
- Required compatibility with existing equipment or services
- Designated exclusive distributor for this product or service
- Maintain consistency of products during research testing
- Supplier is only provider who can meet the required timeline
- Start-up and orientation for new vendor is not cost effective given requirements

Written documentation of some form of price or cost analysis is required on all sole source purchases with an aggregate expenditure in excess of \$10,000. Appropriate documentation may include copies of published price lists, advertised pricing in established magazines, journals, and newspapers, and similar indices. Final responsibility in determining whether an item is a proprietary item and may be purchased from a sole source rests with Procurement.

e. Solicitations for Quotes

Solicitations for quotes shall set forth all requirements that the bidder must fulfill for their bid to be evaluated by the University. Solicitations should be based upon a clear and accurate description of the technical requirements. Complete information should be provided including, but not limited to, quantity, description, delivery requirement, special conditions, drawings, specifications, insurance requirements, bid due date and time. Specifications or requirements should not unduly restrict competition.

f. Notification

Unsuccessful bidders/vendors shall be notified that the bid is closed and awarded. It is not necessary to convey the name of the successful bidder to the unsuccessful bidder.

2. Request for Proposal (RFP) Requirement

The same requirements for bidding apply to an RFP process. Soliciting proposals from vendors for products and services that cannot be evaluated by cost alone may require an RFP. An RFP is required if the award results in a monetary contract with the University for more than twelve (12) consecutive months.

a. RFP Components

When drafting an RFP, purchasers should follow the University's RFP Guidelines to ensure fairness to vendors and consistency. Contact the office of Campus Services x5070 for additional information.

SPECIAL SITUATIONS/EXCEPTIONS

Exceptions to this Policy require written approval by a Vice President or his/her designee.

