



# UINTAH SCHOOL DISTRICT TELEPHONE QUOTATION SHEET

**NOTE: See "General Information" for instructions in obtaining telephone quotations.**

For purchases costing \$1,001 up to \$5,000 for a single item or aggregate schools/departments shall obtain price competition unless purchasing from Utah State Contract, and shall purchase the item from the vendor offering the lowest quote. *Purchases exceeding the above thresholds require two written quotations which must be submitted to the Business Office prior to purchase order approval.*

School/Department/Program \_\_\_\_\_ Purchase Order # \_\_\_\_\_

Prepared By \_\_\_\_\_ Date Ordered \_\_\_\_\_

## UTAH STATE CONTRACT PURCHASE

Utah State Contract Vendor Name \_\_\_\_\_ Contract Number \_\_\_\_\_

**Vendor #1** \_\_\_\_\_ Sales Person \_\_\_\_\_

Quote Date \_\_\_\_\_ Quote Time \_\_\_\_\_ Email Address \_\_\_\_\_

Phone # \_\_\_\_\_ Fax # \_\_\_\_\_ Address \_\_\_\_\_

| QTY | ITEM DESCRIPTION | UNIT COST | EXT COST        | TOTAL              |
|-----|------------------|-----------|-----------------|--------------------|
|     |                  |           |                 |                    |
|     |                  |           |                 |                    |
|     |                  |           |                 |                    |
|     |                  |           |                 |                    |
|     |                  |           |                 |                    |
|     |                  |           |                 |                    |
|     |                  |           | <b>SHIPPING</b> | <b>GRAND TOTAL</b> |

**Vendor #2** \_\_\_\_\_ Sales Person \_\_\_\_\_

Quote Date \_\_\_\_\_ Quote Time \_\_\_\_\_ Email Address \_\_\_\_\_

Phone # \_\_\_\_\_ Fax # \_\_\_\_\_ Address \_\_\_\_\_

| QTY | ITEM DESCRIPTION | UNIT COST | EXT COST        | TOTAL              |
|-----|------------------|-----------|-----------------|--------------------|
|     |                  |           |                 |                    |
|     |                  |           |                 |                    |
|     |                  |           |                 |                    |
|     |                  |           |                 |                    |
|     |                  |           |                 |                    |
|     |                  |           |                 |                    |
|     |                  |           | <b>SHIPPING</b> | <b>GRAND TOTAL</b> |

|            |  |       |  |
|------------|--|-------|--|
| SIGNATURE: |  | AWARD |  |
| COMMENTS:  |  | DATE: |  |

## TELEPHONE QUOTATIONS: GENERAL INFORMATION

Schools/Departments are required to obtain telephone quotes for purchases costing \$1,001 up to \$5,000 for a single item(s) unless purchasing from Utah State Contract.

1. At least two telephone quotations must be obtained. Requesting an email quote from the vendor to verify a phone quote is best practice, but not required.
2. Award is made to the vendor submitting 1) the lowest quote, 2) while meeting minimum specifications, and 3) required delivery date established by the School/Department.
3. The specifications and delivery date established by the School/Department is reasonable and not restrictive.
4. The completed "Telephone Quotation Sheet" must be maintained in a file along with the resulting Purchase Order for audit purposes.

## INSTRUCTIONS:

During the process of obtaining telephone quotes **DO NOT** disclose any information of other quotes obtained (including price, delivery, brand, etc.) This violates the competitive nature of receiving quotes and is unfair to other vendors quoting. After the procurement is complete, prices are public information.

The proper procedure for obtaining telephone quotes is as follows:

- 1) Using the Telephone Quotation Sheet, write down all pertinent information pertaining to the item(s) or service(s) required.
- 2) Call the vendor. Identify who you represent i.e. Uintah School District/Ashley Elementary.
- 3) Indicate that you are asking for a formal quote that may result in a binding contract (Purchase Order).
- 4) Give them the shipping address and required delivery date.
- 5) Using the description written during step 1 above, inform the vendor of the item(s) or service(s) required. Write down all pertinent information being quoted by the vendors, including any deviations from your specifications.
- 6) Ask for unit price including shipping charges.
- 7) Ask for the number of days required for delivery after the receipt of the order.
- 8) Ask for Warranty terms if applicable.
- 9) After obtaining telephone quotes, determine which is the lowest meeting minimum specifications and required delivery date.
- 10) Upon administrator approval, enter requisition in Alio. Once the Purchase Order is generated submit the PO to the vendor.
- 11) Telephone Quotation Sheet, correspondence, quotes etc. along with a copy of the Purchase Order must be filed together and kept for audit purposes.