



Willamette
EDUCATION SERVICE DISTRICT

VERBAL/WRITTEN QUOTE FORM

- No bid requirements for items /services between \$0 - \$9,999.
- Minimum 3 verbal quotes required for items/services \$10,000 but less than \$24,999.
- Minimum 3 written quotes required for items/services \$25,000 but less than \$149,999.
- As per WESD Board Policy, all purchases, contracts or agreements equal or greater than \$150,000 require Board Approval.
- Please check the corresponding box for the quote you are selecting below.

Use this form to summarize quotes received and to recommend vendor for award.
This form must be digitally attached to the requisition.

Name (print): _____

Signature of Person Obtaining Quotes: _____

Dept/Site: _____ Phone: _____

Item/Service Requested: _____

Quote Selected	Date	Vendor Name	Contact Person	Contact Info (email or phone #)	Total Dollar Amount Quoted
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
If you are claiming an exemption, please site the corresponding exemption number from the Purchasing Guide on page 2 in the box to the right (ex. 3.4.7 for Travel).					

If you are not recommending the lowest quote, you are required to provide written justification as to why the lowest quote was not selected below.

If you are unable to obtain three quotes, please explain below.

Business Services Approval: _____ Date: _____

- ❖ Commitments to the recommended vendor cannot be given until approved by Business Services.
 - Return this form and written quotes to the Business Services Administrative Assistant.
 - Questions may be directed to the Executive Director of Business Services at Extension 4611.

Exemptions to Bidding from the Purchasing Guide:

- 3.3 Exemptions to bidding requirements – Specifically authorized in ORS 279A.025. Consult with WESD Business Office before claiming an exemption.
 - 3.3.1 **Textbook and Instructional Material** - Textbook and instructional materials are selected based on curriculum adoptions and the relationship of the texts to instructional standards, not on price. The adoption is in effect throughout the state.
 - 3.3.2 **Sole-Source Purchases** - Public Notice must be posted in Oregon Buys or other public media for at least 7 days to allow time for vendors to submit protests for the sole-source determination. The public notice shall describe the goods or services to be acquired by a sole-source procurement, identify the prospective vendor and include the date, time and place that protests are due (for purchases above \$25,000).
 - 3.3.3 **Cooperative Intergovernmental Purchasing** – This option allows WESD to utilize the “piggyback” option for any bid that currently is in effect for another governmental agency that went through the bidding process. This saves all agencies from duplication of effort. Many cooperative intergovernmental contracts are located on the Oregon Buys website. If using a cooperative intergovernmental contract you must include the contract number on the requisition.
 - 3.3.4 **Other exceptions under ORS: Insurance Contracts, Contracts for Employee Benefits Plans, Real Property, Bond and Debt Agreements, Legal Services, Expert Witness or Consultants Related to Litigation.**
- 3.4 Exemptions to bidding requirements – Specifically authorized by WESD Local Contract Review Board.
 - 3.4.1 **Educational Services** – refers to a wide variety of instructional methods, support services, or school resources provided to students in the effort to help them succeed in school. These services are based on identified learning needs, and provide supplemental or intensive instruction, practice, and guidance. Examples include but are not limited to speech/language pathologists, occupational therapists, physical therapists, braillists and sign language interpreters.
 - 3.4.2 **Copyrighted Materials** – Electronic or printed materials that are protected by copyright laws, generally sold by the author or creator. Materials are rarely available from multiple sources and are usually program specific.
 - 3.4.3 **Periodicals** – Magazines, newspapers, electronic media, academic journals, etc. The market is controlled by publishers and is not responsive to bids.
 - 3.4.4 **Personal Services Less Than \$25,000** - Services needed for a specific geographic area, at a specific time or covering a unique topic not commonly available, such as a presenter for a workshop. Contracts are required.
 - 3.4.5 **Advertising** – Advertising is required in specific publications for legal notices (such as budget hearings) or is targeted to specific markets by the media selected.
 - 3.4.6 **Emergencies** - An emergency is an urgent circumstance that requires immediate response because WESD will lose money, equipment or the ability to provide a service such as roof damage from a storm or damage from a fire. Any emergency purchase must be approved by the Superintendent, Deputy Superintendent, or Director of Business Services.
 - 3.4.7 **Travel** – Travel expenses are exempted due to the following variables:
 - (1) Many locations have limited or single service providers for air service and lodging;
 - (2) Travel expense limits are already in effect; see GSA rates.
<http://www.gsa.gov/portal/category/100120>
 - 3.4.8 **Other Contracting Agencies** – For temporary, time-sensitive services based on availability and skill sets from the contracting agencies. Example: a temporary staffing agency or custodial service.
 - 3.4.9 **Contracts for Medical Professionals** – Medical specialists include nurses, dentists, doctors, pharmacists and other medical professionals.
 - 3.4.10 **Price Regulated Purchases** – Such as electricity, natural gas, garbage, water and sewer. This does not apply to telecommunication services, telephone and internet.