BID/QUOTE SOLICITATION PROCEDURE

A bid/quote or proposal solicitation is the process of notifying potential qualified offerors/bidders that you have a need for a specific product or service and wish to receive bids/quotes or proposals on... Regardless of the threshold or procurement method, all bid solicitation documents should have enough details to allow potential offeror/bidder to submit an adequate response and to avoid unnecessary change orders and risk of exceeding your budget.

For bid solicitations or quote requests under $25,000 where only one quote is required (university dollars) or $10,000 for federal grants, request may be made by calling or emailing the offeror. Documentation of the solicitation should include but not be limited to the elements below: (if additional elements are identified and deemed necessary they may be added)

- **Document call details to include**
  - Offeror name
  - Name of Agent spoken with and contact information to include email address if possible
  - Quantity, hourly rate/unit price and or price agreed to
  - Delivery date(s)
  - If possible, email the offeror right after the call to document the discussion and use this email in place of quote if not available when submitting requisition in EAS

- **Email bids solicitation or quotes request should include**
  - Supplier name and representative’s contact info
  - General description of the goods or services being procured
  - Estimated quantities of goods or services
  - Hourly rate/unit price and total price
  - Delivery date...
  - Use email in place of quote if not available, when submitting requisition in EAS

- **Quote (s) from offeror(s) emailed or faxed should**
  - Should be on company letterhead if possible
  - Contain company contact information – name, address, point of contact and phone number...
  - Have general description of the goods or services being procured
  - Have estimated quantities of goods or services
  - Have hourly rate/unit price and total price
  - Delivery date and or any other specifications

For bid solicitations or quotes request exceeding the micro-purchase threshold where competition and written quotes are required but not a formal RFP/RFQ, (see procurement matrix) request may be made only by email, snapshot of pricing from potential vendor’s website or official quotes submitted by the vendors on their letterhead. Documentation of the solicitation should include by not be limited to the elements below if additional beneficial elements are identified and necessary:

**Requirements/Solicitation Document**

- Requirements document or scope of work with enough in scope/detail to allow offerors to identify the general nature of the goods or services to be procured,
- How the goods and/or services will be used
- Eligibility requirements of offerors
  o Offeror's years of experience,
  o Offeror's past performance
  o Facilities, reputation, financial resources, and other factors necessary to fulfill
    the terms of the contract successfully.
- Estimated quantities of goods or services
- Inclusion of the university's purchasing terms and conditions. Contact Procurement
  Department for RFP/RFQ template if needed
- Performance period or duration of the contract if applicable
- Deliverables details or terms
  o Delivery terms such as time or days for delivery, unloading and install
    services, distribution of materials, location(s) of delivery, etc.
  o Place of performance or delivery
  o Delivery date
  o Inspection and acceptance

Procedural issues to be considered

- How and who to contact at the school/department for questions and clarification
- Clarification of procedures that the school/department will use to explain the
  solicitation and respond to questions,
- The date and time by which the bid or proposal is due (same proposal due date
  should be granted to all bidders),
- Allowable methods for offerors to submit a response (i.e., by mail, hand delivery, or
  electronic mail...)
- Pre-bid meeting and conference information, including a notice when attendance is
  mandatory, if applicable
- Required forms and certifications that must be completed and submitted with the bid
  or proposal (i.e. Bond and permit...)
- An explanation of how GW will proceed if a contract cannot be executed with the
  apparent successful offeror,
- Cancellation, withdrawal, and reissuance procedures that the school/department will
  use when the solicitation is withdrawn for cause or convenience, protest procedures
  that are available to offerors to resolve disputes. Contact your Procurement team for
  assistance
- Details of what method and criteria will be used for evaluating responses to include
  factors and weighting information.