

## **INSTRUCTIONS FOR SOLICITATION and SPECIFICATION DEVELOPMENT**

The Contracts and Procurement Division has developed a brief summary of key factors in creating solicitation documents. Each agency within the County has unique conditions that should be considered when developing a solicitation document. Individuals responsible to manage agency purchases should familiarize themselves with County procurement ordinances Chapter 3.20 and policy 7010. Following are guidelines for developing a solicitation that will result in a purchase order or contract:

1. The solicitation document is created and submitted to Contracts and Procurement by the requesting agency in a word file.
2. The solicitation document typically consists of general bid requirements, specifications and a price schedule.
3. An agency should review the standard terms and conditions, environmental compliance practice, and preference documents. These documents cannot be modified in any way.
4. Contracts and Procurement's responsibility is to edit and approve the agency solicitation document and conduct the solicitation and award processes.
5. County ordinance requires that all procurement practices provide for equal opportunity to compete for the County's business.
6. During the information gathering stage, an agency may research information from multiple sources. When specification writing begins, communication with vendors must be discontinued. (Vendors cannot be involved in the writing of specifications and requirements.)
7. The agency will enter a requisition into the purchasing system for the estimated purchase value.
8. Purchase value estimated greater than \$100,000 annually or at the buyer's request will require Attorney approval of the solicitation document before publication. The buyer will forward to District Attorney's Office for approval.

### **Instructions for completing the solicitation template:**

The overall purpose of a solicitation document is to provide a basis for obtaining a product or service that will satisfy a need at an economical cost and to encourage reasonable competition from many vendors during the process.

County Ordinance, Chapter 3.16.080, requires that there will be no preferential treatment to any one vendor and that all procurement practices will provide for equal opportunities to compete for the county's business.

1. The solicitation document is to be provided by the agency from this template.
2. Within each heading, instructions are underlined and in parenthesis. When filling in the heading information, be clear and concise but provide enough detail to identify what you are requesting.
3. The template headings are not inclusive; your agency may need additional headings with requirements depending on the commodity or service needed.
4. Unless a heading is labeled "optional" all headings in the template shall be used.
5. Delete the headings labeled "optional" with related requirements that are not applicable to your solicitation document.
6. Create specifications unique to your goods and/or services and enter into template. When a prior solicitation for similar goods and/or services is used, please review and update information to current market conditions.
7. If applicable, be sure you prepare sample lists with current part numbers and descriptions.
8. Sample price schedules have been provided for example purposes only.

**In developing the solicitation document to be presented to the Division of Contracts and Procurement, please be prepared to answer all of the following questions.**

1. Who within your Agency developed and wrote the specifications? In developing the specifications what are the main objectives for the equipment or service to be provided?
2. Please provide a statement as to the critical components of the specifications and why they are critical. For those parts of the specifications that have necessary requirements please describe the reasons for the requirements and all acceptable alternatives.
3. If there are measurable outcomes that can be used to support the specification, please discuss those outcomes by describing the performance standard needed not just how the items are to be made.
4. What types of testing of the various products or services has been conducted by the Agency prior to writing the specifications? Could testing be done during the evaluation of the bids received before an award is made?
5. Who helped develop the specifications outside of your Agency? List the suppliers or manufactures that were contacted as part of the research.