

## AGENCY AND VENDOR COMMUNICATIONS GUIDELINES

Vendors often call an Agency wishing to let them know about the products they sale. It is fine for an Agency to meet with vendor as long as we are not in a current solicitation. This gives the vendor an opportunity for small cost purchases and being invited for quotes and other solicitations.

When approached by a vendor during a potential competitive solicitation process, here are some simple guidelines:

### DISCOVERY OR REQUEST FOR INFORMATION STAGE

It is generally necessary to research information as a future purchase is anticipated. This process assists in gathering broad market information and availability on the desired goods or service as well as discovering sources of detailed information that could be useful in the development of the solicitation. Effective tools can be internet searches, phone calls or even discussions with vendors but please remember to research multiple sources. Proprietary specifications often result when only one vendor is researched. Estimated costs may also be requested for budgetary and planning purposes, but it is critical that vendors know the pricing request is merely for an estimate.

### SPECIFICATION OR PROPOSAL WRITING STAGE

To maintain a fair and level approach while writing the solicitation document, discontinue communications with vendors while bid specifications (RFB) or Request for Proposals (RFP) documents are being written. This minimizes the chance that a vendor may have undue influence on the solicitation.

Consultants under contract with the County that assist in specification or proposal writing will not be considered as an eligible bidder due to the obvious conflict of interest.

### SOLICITATION STAGE

Once a solicitation has been released by Contracts and Procurement, communication with vendors should be directed to the buyer named in the solicitation. If vendors approach personnel in your agency, please ask that the inquiry be redirected to the named buyer in the solicitation. This is critical to ensure that some vendors are not given an advantage (or disadvantaged) by information that is given to one potential bidder but not all. Additionally, as you know, only the written text in a solicitation document is binding so non-binding verbal statements only have a potential to create problems.

### AWARD STAGE

After bid or proposals have been submitted to Contracts and Procurement and an award recommendation has been made, agencies may choose to give the name and date of the awarded vendor to vendors when requested. Any other requests such as copies of written documentation should be directed to the buyer at Contracts and Procurement. As some documents are public information and others are not, please have the buyer handle the request.

### POST AWARD STAGE

Please contact the buyer at Contracts and Procurement for assistance when requests for information are made after a purchase has been finalized with a purchase order or contract.