

REQUEST FOR QUOTE (RFQ) PROCUREMENT PROCEDURES

DEFINITIONS: Appeal is a written request from a vendor for a review of the process used to select a vendor in response to a request for bids or quotes.

Bidder is one who submits a bid in response to a Request for Bids, Quotes or Proposals.

Department Head is an appointee of the County Executive or Elected Official charged with the responsibility of managing and overseeing the operations of a County department.

Information Technology Related Purchases are those items that relate to computer, software, hardware and telephone type equipment, services and supplies.

Posting refers to the provision of public notice to vendors that bids, quotes or proposals are being solicited and/or that a contract has been awarded.

Professional Services are infrequent, technical, and/or unique functions performed by independent contractors/consultants whose occupation is the rendering of such services. While not limited to licensed occupations, the services are considered "professional."

Such professional services include, but are not limited to:

- Accounting and Billing Services
- Appraisal Services
- Artists
- Communications: Graphic Design
- Consulting Services
- Data Processing Assessments
- Environmental Studies
- Financial and Operational Audits
- Industrial Planning and Human Engineering
- Legal Services, except witnesses or consultants retained for litigation or potential litigation
- Management Information Systems Studies
- Organizational Studies
- Personnel, Job Classification, and Benefit Studies
- Planning and Budgeting Studies
- Property Management Services
- Quality Improvement and Process Analysis Studies
- Surveys and Feasibility Studies
- Technology Implementation Services
- Training Services
- Translation Services

Quote is the written or verbal commitment of a vendor to furnish Non-Public Works goods, materials and/or services in specific quantities at a firm price.

Request for Quote (RFQ) is a structured procurement decision process used to determine source selection when price is the only factor.

Services means the furnishing of labor, time or effort by a contractor, not involving the delivery of a specific end product other than reports which are merely incidental to the required performance. This term includes professional services.

Specification is any description of the necessary characteristics of a product, service, or item. Specifications will be developed jointly by the user department and Purchasing. The specifications may not be written so as to limit competition.

Standard Terms and Conditions set forth the instructions, rules, regulations and procedures that apply to bidders and/or vendors in the procurement process.

Vendor refers to a company or firm that is a source for goods and/or services.

PROCEDURES: Issuing a Request for Quote (RFQ)

- A. A RFQ will be issued for any non-public works project when price is the only factor under consideration in awarding the contract.
- B. Purchasing will work with the department to develop the specifications to incorporate into the written RFQ document.
- C. Purchasing's role is to facilitate the process.
- D. At a minimum the request for quotes should include:
 - Quotation identification - an assigned unique project number.
 - Quotation submission requirements include the time, date, and location for submission, acceptable methods of submitting, and the prescribed format of documents. Quotes may be submitted to Purchasing in a sealed envelope or by email.
 - Quotation schedule includes at a minimum the date for issuance of the RFQ, deadline for submission of written inquiries, deadline for County responses to written inquiries, quotation submission deadline, and anticipated award date.
 - Quotation opening is the date, time and location of the opening if it is to be a public opening.
 - Quotation contact - the County contact for vendor inquiries regarding the RFQs.
 - Quotation specifications are clearly defined characteristics of a product, service, or item needed. The specifications should not be so limiting as to limit competition.
 - Wherever practicable, the County will specify maximum guarantees or warranties for products, supplies, materials or workmanship to protect the County from defects and to prevent, insofar as possible, costs for future repairs or replacements.
 - RFQ may contain a prospective vendor question and answer time period.

- RFQ Addendums will not be posted within 3 working days of the bid due date, to allow adequate time for vendor response.
- Standard Terms and Conditions

E. If the purchase addresses multiple departments' needs, the Standing Committee will be the Administration Committee.

F. Purchasing will post RFQs on the County's Internet site and/or other web-based automatic project notification system.

G. The opening of RFQs, if specified to be a public opening will be open to the general public. One County employee from the department issuing the RFQ and one County employee from Purchasing will be present at the opening. The names of the bidders and their bids will be read aloud. The date, time, location, and information read at the opening will be recorded.

H. The County may reject any and all quotes. Purchasing will document the reason for rejection and the Director of Administration, Risk Manager, and Director of Administration's appointee must approve if any or all quotes are rejected. A quotation may be rejected for substantial noncompliance with the RFQ specifications. A quotation may not be rejected for any informality in the format in which the proposal was submitted but may be rejected if the quote exceeds budgeted funds.

I. Any contract to purchase goods or services will be awarded to the vendor that submitted the lowest price and meets the RFQ's specification and requirements. Any contract to purchase goods or services that generates revenue will be awarded to the vendor that submitted the lowest price and/or generates the most revenue and meets the RFQ specifications and requirements.

J. Purchasing will issue a notice of intent to award a contract to all vendors who submitted a bid.

K. Purchasing and a representative from the department issuing the RFQ will jointly negotiate the final terms of the contract with the successful vendor. Only one person is required to negotiate directly with the vendor; however, Purchasing and the department issuing the RFQ must both agree to the terms negotiated. Any internal disagreements will be resolved through coordination with the Risk Manager and Corporate Counsel.

L. The final contract may not be signed and finalized until at least three (3) business days after the County has issued the notice of intent to award to all vendors who submitted a proposal. This allows time for the aggrieved bidder to appeal the decision.

M. If the vendor requires the County to sign contract language that is not consistent with the County's standard contract, it must be approved by the Risk Manager and Corporation Counsel prior to execution of the contract by the Department Head and County Executive.

- N. Purchasing is responsible for maintaining all RFQ documents on file in accordance with County records retention policies. The following items should be included in the quotation file:
- Specification documents from the department issuing the request for quotes
 - Final RFQ document
 - Documentation of all vendor inquiries
 - Documentation of all County responses to vendor inquiries
 - All quotes submitted
 - If applicable, documentation to support the rejection of any quotes and the Director of Administration, Risk Manager and/or the Director of Administration's designee's approval
 - If applicable, documentation to support awarding the contract to a vendor who was not the lowest bidder and the Risk Manager and responsible department contact's approval.
 - The executed contract for the items/services.

For more details please reference RFQ flowchart located on the county's intranet site.