

Types of Solicitations

1. **Informal Quote:** Informal quotes are used to obtain pricing for goods and services under \$40,000.

The quote should be written from the vendor to ensure a proper audit trail, but in some circumstances, an oral quote is acceptable. The quote identifies the vendor, product or service to be provided, pricing and terms and conditions of the purchase. When an informal quote is obtained, it should be electronically attached to the requisition when issuing a purchase order. It is advisable to obtain more than one quote for goods and services to ensure that you are getting the best price available.

Request for Quote (RFQ)- A Request for Quote is used to obtain written quotations for goods and services anticipated to exceed \$40,000 but less than \$75,000. It is also used in certain public works projects and complex purchases under \$40,000.

A RFQ is not public advertised but is sent to vendors providing the goods and service. Such vendors may be on a district vendor list, small works roster or chosen using other means. A quote tabulation should be compiled and copies of all quotes received maintained in the department for three years. A copy of the quote tabulation and the successful lowest price quote should be attached to the requisition (electronically) when issuing purchase order.

A RFQ contains the following elements:

- a. Administrative Information (District contact name, number, destination, quote due date, etc).
- b. Standard District Terms and Conditions (i.e., shipping requirements, tax information, Crimes against Children Clause, etc). [Click here to view the Standard Terms and Conditions.](#)
- c. Specifications for the purchase (i.e., quantity, description of the product, performance standards, installation requirements, evaluation criteria etc). The lowest quote will typically prevail unless a vendor or the vendor quote is not acceptable.

2. **Request for Bid (RFB)-** A Request for Bid is used to obtain formal, sealed bids for goods and services exceeding the bid thresholds (goods and services over \$75,000; public works over \$300,000).

Formal specification, drawings and bid form are compiled into a bid package. A RFB is publically advertised in a newspaper of general circulation (typically the South Whidbey Record) and is often published on the South Whidbey School District website. If a vendor list for the commodity or service is available, the RFB is sent directly to vendors placed on the list.

RFB responses are publically opened and read aloud, a bid tabulation compiled and copies of all submittals, proof of submittal prior to deadline (typically the envelope or box top with the bid information, date and time received and initials of receiver) are kept for three years after

opening. The successful bid is kept for 6 years after completion of the service or purchase of goods.

3. Request for Proposal (RFP)- A request for proposal or RFP is an alternative to the competitive bid. It is used when additional criteria other than just compliance with specifications and cost must be considered in the selection process. This method is used most often to acquire specialized services. The choice to use this method in place of competitive bids is usually made when criteria such as professional qualifications and experience are important considerations or when the requester is willing to consider alternative solutions to his or her needs.

An RFP normally provides a general description of the requirement and the desired results. It should include a list of the specific evaluation criteria upon which all proposals will be evaluated along with a corresponding and rating system. The rating system should, whenever possible, be designed to be as objective as possible. The evaluation of proposals is normally performed by a committee. At the committee's discretion, one score can be compiled for each proposal as a collaborative group effort, or each committee member may score and rank each proposal individually with all scores being averaged.

Personal interviews may be conducted by the committee with any or all respondents as part of the evaluation process. The proposal ranked the highest is recommended for award of the contract.

With some RFP's, cost information is not requested as part of the original proposal submittal. With these proposals, cost is normally negotiated with a short list of finalists (usually the top 3) once all interviews are conducted and proposals are evaluated and scored. Once a fee is negotiated with each finalist, the committee may elect to invite a "best and final" offer from each of the finalists if the fees are considered to be too high. After this process is complete, the committee may not revisit this issue. Committee members must then make their selection following the rules set forth in the RFP.