

UNIT 19: ORAL SOLICITATION

October 2003

Duty Conduct oral solicitations.

Conditions Given forecast requirements, written or unwritten acquisition plan, market research, Procurement Request, other related documents, relevant presolicitation business decisions, and a decision to conduct an oral solicitation.

Overall Standard Describe the requirement in complete and unambiguous terms. Do not compromise quotes from one vendor to another.

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Policies

| <i>FAR</i> | <i>Agency Suppl.</i> | <i>Subject</i> |
|------------------------------|----------------------|--|
| 13.003(b)(2) | | Conveying FAR Part 19 provisions during oral solicitations. |
| 13.106-1(c) | | Preference for oral solicitation (and limits on its use). |
| 13.201(b)(1) 13.206(b)(1) | | File documentation for oral quotes. |
| 15.203(f) | | Oral Requests for Proposals. |
| 15.307(b) | | Limits on exchanges. Cut-off date for receipt of final proposal revisions. |
| 52.219-6 | | Notice of total small business set-aside. |

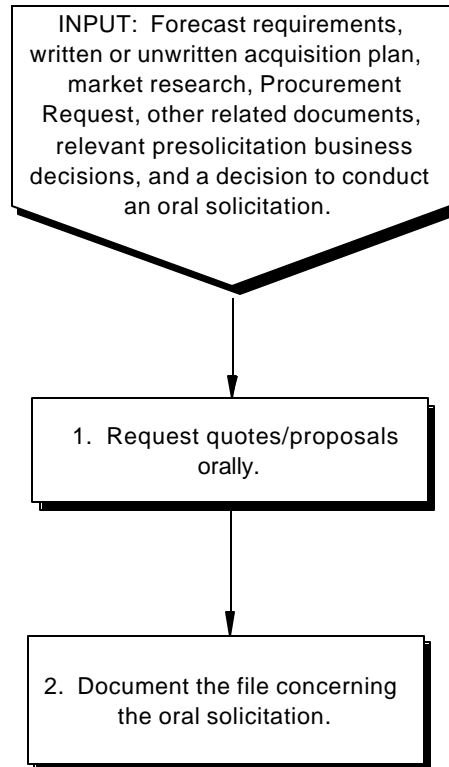
Other KSAs

1. Ability to communicate requirements and procedures orally.
2. Ability to use interpersonal skills to encourage submission of responsive offers/quotations.
3. Ability to demonstrate the attention to detail necessary to communicate requirements and offers/quotations effectively.
4. Ability to make appropriate business decisions to facilitate the acquisition process.
5. Ability to maintain the honesty and integrity of the acquisition process.

Other Policies and References (Annotate As Necessary):

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Tasks

Related Standards

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| <p>1. Request quotes/proposals orally.</p> | <p>Confirm that the firm will respond to an oral request for quotation/proposal, provide relevant information, and request that the firm submit a quote/proposal</p> <p>Assure that the same information is provided to each firm solicited. Typically, an oral request for quotations/proposals should include the following:</p> <ul style="list-style-type: none">• RFP number and date;• Name, address (including electronic address and facsimile address, if appropriate), and telephone number of the Contracting Officer or Contract Negotiator;• Type of contract contemplated;• Quantity, description, and required delivery dates for the item;• Instructions to offerors and evaluation criteria for other than sole source actions (e.g. award will be made to the responsible firm with the low priced, technically acceptable quote/proposal);• Quote/proposal due date and time;• Any restrictions on competition (e.g., a small business set-aside); and• Other relevant information (e.g., incentives, variations in delivery schedule, cost proposal support, and data requirements). <p>Never engage in conduct that:</p> <ul style="list-style-type: none">• Favors one source over another;• Reveals an offeror's technical solution;• Reveals an offeror's price without permission;or• Reveals source selection information. |
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Tasks

Related Standards

2. Document the file concerning the oral solicitation.

For a simplified acquisition, establish and maintain records in order to clearly reflect the propriety of placing the order at the price paid with the supplier concerned. In most cases, that will consist merely of showing the names of the suppliers contacted and the prices and other terms and conditions quoted by each.

The contract files supporting oral solicitations, for other than simplified acquisitions, should include:

- A description of the requirement;
- Rationale for use of an oral solicitation;
- Sources solicited, including the date, time, name of individuals contacted, and prices offered;
- Any criteria other than price and technical acceptability used to evaluate proposals along with an evaluation of each proposal using the established criteria; and
- The solicitation number provided to the prospective offerors.