State of Ohio Model Bid/Quote Template for General Goods & Services (Non-IT)

Guidance Document

Department of Administrative Services, Office of Procurement Services
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Purpose
This guidance document provides instructions on using and completing the model bid/quote template.

Background
Within the space of government procurement, competition is a fundamental element that helps ensure that public funds are ethically and wisely spent. Another fundamental component is standardized solicitation tools and processes that provide agencies and suppliers with a predictable and consistent experience when doing business.

To these ends, a multi-agency workgroup, in conjunction with the Department of Administrative Services, has developed a model bid/quote template intended for agency use when purchasing general goods and services (not including information technology). The template is intended for use by agencies when exercising their direct purchase authority to solicit bids and/or quotes for simple, straightforward procurement needs. Opportunities that exceed $25,000 must be posted to the State Procurement web portal (procure.ohio.gov) per ORC § 125.112. See page 11 for instructions on posting to the State Procurement web portal.

Points of Consideration
- Use of this template does not supplant any existing governance; agencies are still required to comply with all applicable statutes, rules, policies, and procedures that govern the procurement process (e.g DAS Release & Permit process, Controlling Board, etc.).
- Use of this template does not constitute competitive selection.
- This model template was developed as an optional resource for agencies to use when exercising their direct purchase authority to purchase general goods or services.
- This template is not intended to be used for purchases of IT goods or services.
- Agency procurement staff ought to populate the template with their respective agency information and consult with their agency’s legal counsel when using the template to prepare requests for quotes/bids and determining the appropriate terms and conditions to include.
- Use of this template does not result in the creation of a contract held by the Department of Administrative Services.
- This template is not to be used for quoting on existing term contracts. Existing term contracts contain their own terms and conditions.
- If the entire bid/quote is an MBE set-aside, carve-out MBE language is not necessary.
Using the Template

Unlocking Template
The bid/quote template is restricted for editing to provide agencies the ability to tab through the document form fields. If you need to unlock the form use the password "temp". To unlock the form, follow the steps below:

1. Select the “Review” tab.
2. Click “Restrict Editing”.
3. Click “Stop Protection”.
4. A menu box will pop up where you will enter the password “temp”, and then click “OK”.

![Diagram of the bid/quote template with steps for unlocking the form highlighted.]
Locking the Template
Make any necessary changes you need to the document and reset the password. The following steps will restrict editing in the document with the exception of form fields or sections preselected for editing.

1. Select the “Review” tab.
2. Select “Restrict Editing”.
3. Select “Yes, Start Enforcing Protection”.
4. Type a password of your choosing, and then reenter the password to confirm.
5. Click “OK”.
Completing the Request for Bid/Quote Template

The Request for bid/quote template consists of form fields and pull down menus where you will need to select from the menu provided; there are also calendar menus where you will select dates. This section will provide screen shots and descriptions of the fields you will need to populate.

 Completing Page 1 of the Request for Bid/Quote Template

1. Below the words State of Ohio enter your Department’s information, hit enter to add additional form fields and enter the address, City, State and Zip.
2. The word BID in REQUEST FOR BID can be changed to QUOTE by selecting the pull down menu, tab to the next field and the Bid Number form field will update.
3. The blue square with the small image inside is where you can import your Department logo.
4. Select “The signed” or “The original signed”, some agencies will accept duplicate signatures.

5. Enter the time of the bid/quote opening and select a.m. or p.m. from the pull down menu.

6. Enter your bid/quote number.

7. Select the bid/quote opening date.
8. Enter where you would like the bid delivered, faxed or emailed, such as your department address. Hit enter to add additional form fields. Tab to the “Attn.” field.

9. Enter your requisition number or index number if applicable.
10. Select the notice date, this is the date you are advertising the bid/quote.

11. **Bidders** will complete the following section. If electronic submissions are permitted, the bidder will populate the form fields and select their preference for receiving purchase orders as well as enter payment terms if different than the standard.

12. Enter the address where the vendor should send the invoice in the “BILL TO:” field. Enter the address where the vendor should ship the goods in the “SHIP TO:” field. For additional fields, hit enter.
13. Enter your delivery date for your goods. The bidder will complete Delivery Offered (if Different).

14. A pull down menu is available where you can select minority set-aside or a blank line depending on the type of bid/quote you are requesting.

15. Enter a brief description of the goods or services you are seeking bids/quotes.

16. Select the effective date of the contract from the calendar menu.
17. Select from the pull down menu the language that best fits your bid/quote. If you select “until this date” tab to the next field and select the date from the calendar menu. If you select one of the other pull down menus tab to the next field and the calendar menu will disappear.

![Image of a calendar menu with options for selecting a date]

18. Select “The signed” or “The original signed document”, some agencies will accept duplicate signatures. In the next field, enter where you want the bids to be submitted, you can enter an address, fax number or email address. The time and a.m. or p.m. will automatically update based on what you selected above, as long as you tabbed out of the field.

![Image of a form with options for submitting bids]

Completing Page 2 of the Request for Bid/Quote Template

19. Certification Statements – State Agencies may remove section I. Domestic and/or Ohio Preference and Section II. EDGE Designation. Section II. Independent Contractor Acknowledgement is required and further defined in the Supplemental Contract Terms and Conditions, S-19.

Completing Page 3 of the Request for Bid/Quote Template

In 2009 Executive Order 2008-125 was issued ordering state agencies that purchase supplies or services exceeding $25,000 to post all opportunities on the State Procurement central web portal. It further directed State Agencies to post current contracts exceeding $25,000 on the State Procurement web portal within ninety (90) days of its establishment. The posting of contract awards was codified into law under ORC 125.112.

State agencies must request a Login name and password at the following web site to post opportunities and update contract information: [https://www.procare.ohio.gov/proc/RequestAgencyUserAccount.asp](https://www.procare.ohio.gov/proc/RequestAgencyUserAccount.asp). Questions regarding the Procurement web portal should be directed to the procurement support team at 1-614-466-5090.

20. Agencies posting their opportunities to the State Procurement central web portal can elect to use the Q&A feature of the portal to gather and respond to inquiries, or remove the paragraph from the template.
To remove this paragraph, and to add requirements and specifications to your opportunity, you will need to unlock the document (as explained on page 3 of this document).

21. You can insert requirements specific to the goods or services at this point, before the price schedule.

**SPECIFICATIONS**

Insert requirements here

22. You are encouraged to use one of the two price schedule examples inserted in the template.

### PRICE SCHEDULE

<table>
<thead>
<tr>
<th>ITEM NO.</th>
<th>QTY.</th>
<th>UNIT</th>
<th>DESCRIPTION</th>
<th>BRAND/MODEL</th>
<th>UNIT PRICE</th>
<th>EXTENDED AMOUNT</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>5</td>
<td>Ea.</td>
<td>TEST</td>
<td>TEST</td>
<td>$15.00</td>
<td>$0.00</td>
</tr>
</tbody>
</table>

### DELIVERABLES & COMPENSATION

<table>
<thead>
<tr>
<th>Deliverables (Due Date and Compensation only noted if Applicable or Required)</th>
<th>Due Date</th>
<th>Compensation</th>
</tr>
</thead>
<tbody>
<tr>
<td>During the Contract Period, and Contractor agree to the following:</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

1. [Contractor shall present educational materials/training modules to a minimum of six (6) regional audiences.]

<table>
<thead>
<tr>
<th>1. Must be completed by 12/31/2016</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>TOTAL CONTRACT AMOUNT</strong></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Completing Pages 4-6 of the Request for Bid/Quote Template

23. Special Contract Terms and Conditions – Special Contract Terms and Conditions supersede Standard and Supplemental Terms and Conditions. The italicized text below provides additional guidance on using the special terms and conditions, so that agencies can determine if the terms apply to the opportunity. Special Contract Terms and Conditions not needed for an opportunity should be deleted prior to it. Agencies are advised to work with their legal counsel on selecting the appropriate special and supplemental contract terms and conditions.

SPECIAL CONTRACT TERMS AND CONDITIONS

General Requirements

Amendments to Contract Terms and Conditions (Supplies or Services)

This is the first paragraph to insert when using special terms and conditions.

Amendments to Contract Standard Terms and Conditions. If the contract involves Supplies and/or Services, the following Amendments to the Standard Contract Terms and Conditions do hereby become a part hereof. In the event that an amendment conflicts with the Standard Contract Terms and Conditions, the Amendment will prevail.

This paragraph is used when purchasing supplies delivered to participating agency within XX day after receipt of order.

Delivery & Acceptance (Supplies)

Delivery and Acceptance. If the contract involves Supplies, Supplies will be delivered to the participating agency within _ days after receipt of order and, in accordance with paragraphs S-7, S-8, and S-9 of the SUPPLEMENTAL CONTRACT TERMS AND CONDITIONS. Failure to deliver within the fifteen (15) days (or by a due date specified by the state agency, provided the due date is later than the specified contract date) is a breach of this contract. The State of Ohio may pursue actual, direct, or appropriate liquidated damages because of such breach, as well as any other remedies specified in section IC (Termination/Suspension) and section II (Contract Remedies) of the “STANDARD CONTRACT TERMS AND CONDITIONS”.

The delivery location will be noted on the purchase order issued by the participating agency. Acceptance (transfer of title) will occur upon the inspection and written confirmation by the ordering agency that the supplies delivered conform to the requirements set forth in the Contract. Unless otherwise provided in the Contract, acceptance shall be conclusive except as to latent defects, fraud, or such gross mistakes as amount to fraud.

This paragraph is used when purchasing services delivered to participating agency.

Delivery & Acceptance (Services)
**Delivery and Acceptance.** If the contract involves Services, Services will be performed as set forth in the Contract and in accordance with paragraphs S-7, S-8, and S-9 of the SUPPLEMENTAL CONTRACT TERMS AND CONDITIONS. The location of performance will be noted on the purchase order issued by the participating agency. Payment for services rendered will occur upon the inspection and written confirmation by the ordering agency that the services provided conform to the requirements set forth in the Contract. Unless otherwise provided in the Contract, payment shall be conclusive except as to latent defects, fraud, or such gross mistakes as amount to fraud.

**General Requirements, Project Specific (Supplies and Services)**

*You should check the Dept. of Commerce website to determine if prevailing wage is required.*

**Prevailing Wage [Use in labor related Bids] (Maintenance and Repair Services)**

**Prevailing Wage.** If the contract involves Maintenance and Repair Services, the Ohio Department of Commerce has determined that work identified in this bid and to be performed under contract is subject to the requirements of O.R.C. Sections 4115.03 to 4115.16, Prevailing Wage. The prevailing wage scale, as published by the Ohio Department of Commerce, is herewith attached to and becomes a part of this bid. Upon award of a Contract by the State, the successful bidder (“Contractor”), and all of his sub-contractors, guarantees that the prevailing wage for the area, to include any adjustments thereto, as published by the Ohio Department of Commerce, will apply to any workman assigned by him or all of his sub-contractors to this project. The ordering agency will serve as prevailing wage coordinator and will be responsible for proper application of labor rates as required by the Ohio Department of Commerce. Responsibilities of the Prevailing Wage Coordinator include, but are not limited to; setting up and maintaining payroll reports, monitoring when payments of wages are made, receiving the Contractor’s complete payroll records of each employee, establish procedures to monitor compliance, notify Contractor of any adjustment to the prevailing wage scales and report delinquencies on the part of the Contractor. The successful bidder and all of his sub-contractors shall strictly comply with the wage provisions of the contract.

**Supportive Documentation and Samples. (Supplies)**

**Product Samples, non-mandatory submission. (Supplies)**

**Product Samples.** If the contract involves Supplies, the bidder(s) may be required to submit samples of the supplies being offered. The samples will be used in the evaluation process to determine the lowest responsive and responsible bidder. If not included as part of its bid response, the bidder will be required to provide the samples within _____ calendar days after notification. After award of the contract, the samples will be used as a basis of comparison with actual product delivered under contract. Any variation between the samples and product being delivered will be considered as an event of default. Any variations between the samples and actual product being delivered that are due to manufacturer changes may be acceptable and shall require prior written approval from the State.

**Evaluation: (Supplies and Services)** If the contract involves Supplies or Services, use one of the following clauses and modify as necessary.
**Evaluation.** The contract will be awarded to... (insert language as to how the bids will be evaluated or choose an option below:)

**Evaluation.** The contract will be awarded to the bidder whose bid/quote is determined to be the most advantageous to the State as determined by the State.

**Evaluation.** The contract will be awarded to the lowest responsive and responsible bidder as determined by the State.

**Award: (Supplies and Services)** If the contract involves Supplies or Services, use one of the following clauses and modify as necessary.

*(Line Item)*

**Contract Award.** The contract will be awarded to the lowest responsive and responsible bidder by line item.

*(Low Lot Total)*

**Contract Award.** The contract will be awarded to the lowest responsive and responsible bidder by low lot total. Low lot total will be determined by multiplying the unit cost by the estimated usage listed in the bid and then adding each of the totals together to arrive at a total for all items. Failure to bid all items may result in the bidder being deemed not responsive.

**Firm Fixed-Price Contract (Supplies and Services)**

**Firm-Fixed-Price Contract.** If this contract involves Supplies and/or Services, the contract is a Firm Fixed-Price Contract. The Contractor(s) is required to provide to the using agency supplies or services at the listed price(s) for the duration of the contract, and any extensions thereto.

**Minority Set Aside (Supplies and Services)**

**Embedded Minority Set Aside (Supplies and Services) – Only when Embedded Solicitation is included.**

**Background.** The State is committed to making more State contracts and opportunities available to minority business enterprises (MBE) certified by the Ohio Department of Administrative Services pursuant to Section 123.151 of the Ohio Revised Code and Rule 123:2-15-01 of the Ohio Administrative Code. Choose an item to seek and set aside a portion of the Work to be exclusively performed by Ohio certified MBE businesses. For more information regarding Ohio MBE certification requirements, including a list of Ohio certified MBE businesses, please visit the DAS Equal Opportunity Division web site at: [http://das.ohio.gov/Divisions/EqualOpportunity/MBEEDGECertification/tabid/134/default.aspx](http://das.ohio.gov/Divisions/EqualOpportunity/MBEEDGECertification/tabid/134/default.aspx)

**Sheltered Solicitation.** If the Vendor is including an MBE component within this Contract, in seeking solicitations from Ohio certified MBE subcontractors, the Vendor must:
Utilize a competitive process to which only Ohio certified MBEs may respond; Have established criteria by which prospective Ohio MBEs will be evaluated including business ability and specific experience related to the Work requirements; and Require the Ohio certified MBE maintain a valid certification throughout the term of the Contract, including any renewals.

Vendor shall indicate on all invoices submitted to the Agency the dollar amount attributed to the Work provided by the selected Ohio certified MBE subcontractors along with documentation of the Ohio certified MBE subcontractor’s activities. Vendor shall report all Ohio certified MBE subcontractor payments under this Contract monthly to the Agency. Compliance with Vendor’s proposed cost set-aside percentage is a term of this contract and failure to attain the proposed percentage by the expiration of the contract may result in the Vendor being found in breach of contract.

*(Use the following if the Embedded MBE solicitation is required, not if the solicitation is encouraged)*

The Vendor who identifies one or more qualified Ohio certified MBE subcontractor in its bid and sets aside a specific percentage of the cost of its total bid exclusively for the identified Ohio certified MBE subcontractors’ Work will be deemed responsive. Offerors who do not identify a percentage of the cost of its total bid for one or more Ohio certified MBE subcontractors or do not identify any Ohio certified MBE subcontractor may be deemed non-responsive.

*(Use the following if the entire solicitation is MBE)*

MINORITY BUSINESS ENTERPRISE (MBE) SET ASIDE: The State is committed to making more State contracts and opportunities available to minority business enterprises (MBE) certified by the Ohio Department of Administrative Services (DAS) pursuant to Section 123.151 of the Ohio Revised Code and Rule 123:2-15-01 of the Ohio Administrative Code. This ITB is being issued as a minority set aside contract in accordance Section 125.081 of the Ohio Revised Code. All bidders must be an Ohio certified MBE as of the Bid opening date. If a certification application has been submitted that needs to be expedited to meet the solicitation opening date, contact the DAS Equal Opportunity Division at 614-466-8380. For more information regarding Ohio MBE certification requirements, including a list of Ohio certified MBE business, please visit the DAS Equal Opportunity Division website at: [http://das.ohio.gov/Divisions/EqualOpportunity/MBEEDEGCertification/tabid/134/default.aspx](http://das.ohio.gov/Divisions/EqualOpportunity/MBEEDEGCertification/tabid/134/default.aspx)

This language is for the agency to be able to determine whether or not automobile liability insurance is necessary. This will depend on which box the bidder selects.

Bid Automobile Liability Checklist: (Supplies and Services) If the contract involves Supplies and/or Services, the following pertains to paragraph S-13 of the Supplemental Terms and Conditions. If Box 1 is checked verify automobile liability insurance for the amount indicated is provided by the contractor prior to award.

Contractor will indicate, by checking the appropriate box(es) below, which mode of transportation will apply to this contract.

- [ ] Bidder/Broker (“The Contractor”) or their Sub Contractor will make delivery or be performing services using a vehicle that is owned, leased or rented. Provide Certificate of Insurance documenting automobile liability with a Combined Single Limit of $500,000.00. (This number may be increased as necessary.)
Goods/Services will be delivered via common carrier.

No employee or representative of the contractor will have cause to be on state property to make deliveries or to perform services.

*This paragraph is for the bidder to document subcontractors.*

**CONTRACTOR DISCLOSURE CERTIFICATION**

Disclosure of Subcontractors / Joint Ventures (See Standard Contract Terms and Conditions, Section (roman numeral) V. General Provisions: Paragraph Q.,). *(Supplies and Services)* If the contract involves Supplies and/or Services, the Agency may elect to remove the last sentence if not using the Standard Terms and Conditions which includes termination paragraphs.

List names of subcontractors who will be performing work under the Contract.

______________________________

______________________________

______________________________

The Bidder agrees that no changes will be made to this list of subcontractors without prior written approval of the State. Any attempt by the Bidder/Contractor to change or otherwise alter subcontractors without prior written approval of the State, will be deemed as a default. If a default should occur, the State will seek all legal remedies as set forth in the Terms and Conditions which may include immediate cancellation of the Contract.

**Sweatshop Free - Use in apparel, footwear and uniform rental contracts (Supplies)**

Sweatshop Free: If the contract involves Supplies, Bidder/Offeror certifies that all facilities used for the production of the supplies or performance of services offered in the contract is in compliance with applicable domestic labor, employment, health and safety, environmental and building laws. This certification applies to any and all suppliers and/or subcontractors used by the Contractor in furnishing the supplies or services described in the Contract. If the State receives a complaint alleging non-compliance with sweatshop free requirements, the State may enlist the services of an independent monitor to investigate allegations of such non-compliance on the part of the Contractor, any subcontractors or suppliers used by the Contractor in performance of the Contract. If allegations are proven to be accurate, the Contractor will be advised by the State of the next course of action to resolve the complaint and the Contractor will be responsible for any costs associated with the investigation. Items that will be considered in an investigation include, but are not limited to standards for wages, occupational safety and work hours.
Completing Pages 7-8 of the Request for Bid/Quote Template
  24. Instructions, Terms, and Conditions – These instructions are required. Additional instructions for bidding may be entered at the end of this section.

Completing Pages 9-13 of the Request for Bid/Quote Template
  25. Standard Contract Terms and Conditions – These contract terms and conditions are required.

Completing Pages 14-16 of the Request for Bid/Quote Template
  26. Supplemental Contract Terms and Conditions – The supplemental contract terms and conditions are optional and may or may not be needed, depending upon the opportunity. Agencies are advised to work with their legal counsel on selecting the appropriate supplemental contract terms and conditions.

Completing Page 17 of the Request for Bid/Quote Template
  27. Tab over to the gray fields and enter the department name in the first one. The second field is where you will enter the signature of the State Agency representative that has authority to sign the awarded contract.

At this point we recommend you re-lock the template and select a new password, and save your final document in pdf format.