

Drafting Bid Solicitation Documents (IFBs, RFBs, RFQs, IFQs, and RFQs)

THE GOAL: Your bid solicitation should maximize the number of responsive bids you receive from responsible bidders.

1. Getting Started:

- Find a template (“go-by”)
 - Check your own files (keep files organized and searchable)
 - Use public purchasing listservs
 - Use Google (search with the name of the commodity and add words like “invitation” and “bid” or “IFB”)
 - Search NIGP e-net lists
 - Search the NIGP specification library
 - Other sources _____
- Listen to the end user
 - What does the end user need? Why?
 - What does the end user want? Why?
 - Be wary of brand-specific or vendor-specific requests—ask “why?”
- Educate yourself
 - What you need to learn:
 - Commodity options
 - Sources of supply
 - New technology, if any
 - How to learn it:
 - Talk to other purchasers
 - Use the internet
 - Review “go-bys”
 - Review catalogs
 - Talk to vendors

2. Document Substance:

- If you are using a document from another solicitation as your template, carefully search for and remove all references and information that are not part of your current solicitation (e.g. other government/entity names, contact information, commodity codes, or Terms & Conditions used by the other government/entity).
- Define key terms in a “Definitions” section.
 - Spell and reference defined terms correctly throughout your document.
 - Capitalize, bold, or italicize all defined terms throughout your document.
- Use what you’ve learned about the commodity and about your end user’s needs to draft your specifications. Minimum requirements should be broad enough to include as many vendors as possible, but specific enough to fit your end user’s real needs.
- Be clear, simple, and accurate:
 - Avoid legalese and fancy-sounding words whenever possible. (Replace “Functionality requisites constitute...” with “Product must be able to...”.)
 - Use “shall” and “must”—not “should” or “may”—when you mean to impose a requirement or duty.
- Look for “hidden” brand-specific specifications (e.g. check for brand names and trade names, as well as unique and too-specific measurements or sizes), and re-write them by substituting performance requirements (what should the product be able to do?).
- Use the active voice instead of the passive voice whenever possible, because it clarifies *who* must do *what*. (Replace “The following documents must be submitted...” with “Vendor must submit the following documents...”.)
- Make sure the standard of award (e.g. “lowest responsible bidder” or “best interest of the unit”) is clear and easy to find, with no contradictory standards listed.
- If applicable, make sure the specific evaluation criteria are clear and easy to find.
- Use standard terms and conditions that were recently (within the past year, if possible) reviewed and approved by your attorney.
- Make sure all key information (such as contact person, dates for bid submission or bid opening, and mailing addresses for bid submission) are accurate and consistent throughout the document.

3. Document Format:

- Use a short and descriptive document title (e.g. “Invitation For Bids on Band Uniforms”).
- Create a header or footer (with the document title, entity name, and due date and time) that appears on each page.
- Place page numbers (“page X of Y”) on each page.
- State clearly and conspicuously the number of copies required (e.g. “original plus 5 copies”).
- Specify whether electronic submission is acceptable, and, if so, what format is required.
- Double check contact information (phone numbers, email addresses, and street/P.O. Box addresses) for typos.
- Use short but descriptive section headings (e.g. “Standard of award” rather than simply “Award” would be a good heading for the section outlining your standard of award.)
- Format your headings, sections, and sub-sections in a consistent and easy-to-follow manner.
- Replace all slashes (“/”) with an “and” or “or.” (Does “chairs/desks/bookshelves” mean “chairs, desks, **and** bookshelves” or “chairs, desks, **or** bookshelves”?)
- Check the entire document for typos and spelling errors.
- Check the document for reading ease (aim for 60 to 70 points on the Flesch Reading Ease scale, or for a score of 7 to 8 on the Flesch-Kincaid Grade Level score¹).
- Get a “fresh eyes” review: someone who did not participate in drafting the document should read it for inconsistencies, typos, errors, and comprehension.
- As your last step, review cross-references to headings and sections for accuracy.

Two notes about drafts:

1. *Save drafts with the date and the initials of the most recent person to edit the draft as part of the document name (e.g. FireTruckIFB_30July08_EY). This will help to ensure that changes are made only to the most current version of each draft.*
2. *Be aware that your drafts may be public records (this varies by state).*

¹ Microsoft Word will check your documents for reading ease. For **Word 2003** users: on the Tools menu, click Options, and then click “Spelling & Grammar”; select the “Check grammar with spelling” check box; select the “Show readability statistics” check box, and then click OK; on the Standard toolbar, click the Spelling and Grammar Button to see your readability statistics after the spelling and grammar review is completed. For **Word 2007** users: on the Review tab, click “Spelling & Grammar”; click “Options” in the bottom left-hand corner of the window; in the next window, select the “Show readability statistics” check box (under “When correcting spelling and grammar in Word”—you may have to first check “Check grammar with spelling”); click “Recheck document,” and “OK.”