**User Guide**

Contract 02413, Analytical Laboratory Services

1. **Process Overview**

When services are required under this contract, your task as a Purchaser will be to:

1. Define and determine job requirements and scope of work.
2. Develop an estimated value of work.

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| **Small Project Process**  **If value of work is at or below the direct buy limit ($10,000)**  \* Purchaser reviews options in the prequalified WEBS pool titled “Rapid Selection List of Vendors” and selects provider that best meets the need.  \* Purchaser verifies that lab and methods are currently accredited by checking <http://www.ecy.wa.gov/programs/eap/labs/lab-accreditation.html>.  \* Purchaser places order with the selected vendor using their own Purchase Order  and tracking system. |

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| **Competitive Process (Tier 2)**  **If value of work is greater than ($10,000)**  \* Purchaser completes a **Work Request** describing their project using the tool found in this guide (see embedded file).  \* **Work Request** will include a detailed scope of work, clear deliverables, and a request for firm’s qualification/experience, including their commitment to meeting needed schedule. Work Request must contain the detailed evaluation criteria that will be used to make a contract award. Strive for a “best value” outcome whenever possible. Consider using weighted criteria to place highest value on your most critical service components. Avoid using proprietary language or terms and be certain the work elements requested are commonly acceptable and “standard in the industry”.  \* Purchaser posts the completed Work Request to venders in the prequalified WEBS pool titled “State Contract #02413 - “Analytical Laboratory Services”.  \* Bidder Responses go directly to the Purchaser  \* Purchaser evaluates responses using published criteria  \* Purchaser selects successful Contractor  \* Purchaser notifies and documents successful Contractor in WEBS  \* Purchaser provides debriefing to unsuccessful Bidders, and processes protests in accordance with the State’s Complaint and Protest Policy. (See embedded file)    \* Purchaser places order with the selected Contractor using own Purchase Order  and tracking system.  \* Purchaser documents the order justification for agency’s audit file.  \* Purchaser emails a complete solicitation and award packet to the DES Contract Administrator. |

1. **Beginning the Procurement Process**

In **defining the job** requirements, you will want to consider several factors; complexity of work, available timeframe, sensitivity of the issues, geographical location, expedited services, extensive reporting requirements, and any other factors that may affect the final cost.

Using this information and the posted pricing from awarded vendors, **estimate the value** of the work. If the test is one of a series of on-going tests, be sure to include the multiplier in your estimate.

Using your cost estimate, select the appropriate **procurement process**. You may always seek competitive Bids, (second tier competition) even if your estimate is below the direct buy limit. If the scope is small, but entails an on-going program with a common method, or purpose, consider using the competitive process to establish one contractor who will give you consistent service, reports, etc. and will partner with you throughout the period of your project.

If you contact a vendor to place a service order that is based on your estimate and discover that the work will exceed the direct buy limit, tell the vendor you will need to utilize the more formal competitive bid process. Then be sure to include that vendor in your process to allow them an opportunity to compete.

1. **Small Project Orders**

Before **selecting a provider,** look at the defined service components that you incorporated into your estimate**.** Again, consider seeking the best overall value. This approach incorporates what is in the state’s (your) best interest for a particular application or set of circumstances. For instance, sometimes hiring a more costly provider may result in more overall value once you consider the critical service components necessary to obtain your desired outcome.

When you place your order, use your own Purchase Order and tracking system for the **First Tier** process.

1. **Competitive Orders**

Competitive orders utilize the **Second Tier** process. The tool for beginning this process is the Work Order Request form. (See embedded file)



The form has a section where you will provide labs with a description of the work you need to have completed. This **Scope of Work** section should include specific details about your specification requirements. These might include: a specific analytical method or service, quality assurance and control requirements, a standard or process to be used, sampling requirements, frequency of needed services, expedited delivery, specialty reports, etc.

Once you have defined the scope of work, take a look at your work and ask yourself, if a provider could meet all the requirements you have identified; would you accept them without reservation? If you cannot say you would approve just anyone meeting those requirements, think again about what else it would take to insure the work will be performed to your necessary requirements. These requirements become your Bidder Responsibility criteria. This can be challenging as you do not want requirements that are so rigid they limit competition. Ask only for what is needed to meet your requirements. Anything in excess of that, may limit the competitive vendor pool and not result in the best value. Again, you are striving for the verifiable best value as you identify evaluation criteria in your Second Tier Work Order Request. Think about how you will evaluate the capacity and capability of Bidders to be certain they can/will provide the functionality and reliability you require. Include these Bidder responsibility measures in your detailed evaluation criteria. Be sure to include all evaluation criteria in your published Work Request.

The Work Request will be published on WEBS to the **second tier** vendor pool. These vendors have not had their pricing evaluated. The competition for price will occur when the Contractors respond to your Bidding opportunity.

Allow time, from the date of posting, for the contractors to respond. Two weeks is minimal and one month is recommended. Document when (exact date and time) bid proposals arrive. When the response due date/time has passed, evaluate all bid proposals based on your pre-established criteria. First evaluate for responsiveness to ensure all of the bidding process requirements were met. Once Bids are determined to be responsive, evaluate for cost and other pre-established weighted criteria. Do not evaluate one vendor against another. Evaluate each in relationship to your requirements. Finally, evaluate for Bidder responsibility criteria to be certain the vendor has the capacity to perform the services you require.

1. **Finalizing the Award**

If the project is straight forward, one time work, use your own Purchase Order process to order the work, referencing the bid submittal. If the project will be on-going or unusually complex, finalize the process by using the Work Request and the winning vendor’s response to create a Work Contract file. Secure all required signatures prior to start of work.

1. **Documentation Requirements**

**When the expected total cost of the job/service is at or below the direct limit,** no special documentation is required. Follow the requirements of your procurement office for normal procurement documentation.

**When the expected total cost of the job/service is greater than the direct buy limit,** the solicitation and selection process must be documented and the file retained for audit purposes. At a minimum, Purchaser will maintain a copy of:

1. The Work Request posted to the WEBS vendor pool

2. Responses submitted as a result of the request

3. Evaluation criteria and process utilized to determine the awarded vendor

4. The Purchase Order as sent to the selected vendor

5. Any other documentation that adds clarity to the procurement.

**Reporting Requirements**

Purchaser will report to DES, Master Contracts and Consulting (Procurement Coordinator) when they:

1. Award a work request
2. Amend a work request (See embedded file below)



1. Finalize and close out a work request (See embedded file below)



Purchaser will include, at a minimum, information regarding the State Master Contract number, project start and end dates, the selected vendor’s name, a scope of work to be performed, the estimated value and the actual value of the contract. This information will be submitted, at contract close-out, to the Contract Administrator.