

TELEPHONE RECORD FOR GOODS AND NONPROFESSIONAL SERVICES (up to \$5,000)

REQUEST NUMBER: _____

BUYER/DEPARTMENT: _____

		BIDDER #1	BIDDER #2	BIDDER #3
		DATE: _____	DATE: _____	DATE: _____
VENDOR'S eVA ID or DUNS NUMBER >				
VENDOR NAME >				
VENDOR ADDRESS >				
CONTACT PERSON >				
PHONE NUMBER >				
FAX NUMBER >				
QUANTITY	GOODS/SERVICE DESCRIPTION	UNIT PRICE / TOTAL PRICE	UNIT PRICE / TOTAL PRICE	UNIT PRICE / TOTAL PRICE
(1)				
(2)				
SCOPE OF WORK				
LABOR COSTS >				
MATERIAL COSTS >				
DELIVERY DATE or PERFORMANCE PERIOD / TIME >				
PROMPT PAYMENT TERMS >				
SHIPPING / HANDLING INCLUDED? YES / NO >				
IF NO: CITE SHIPPING / HANDLING COST >				
TOTAL ORDER VALUE >				
AWARDED TO / REASON >				
NON-SWaM AWARD REASON:				

INSTRUCTIONS - TELEPHONE RECORD FOR GOODS AND NONPROFESSIONAL SERVICES

1. **CAUTION:** Care should be exercised when obtaining pricing information by telephone. **GOODS:** The description of what is desired should be described in generic terms or by use of brand name (including make and model). When specifying a brand name, be prepared to receive bids on an “or equivalent basis” unless the item desired has been justified as proprietary. When identifying potential sources to solicit, ensure that those selected are in business to provide what is needed. **NONPROFESSIONAL SERVICES:** The scope of work should describe and define the task(s) which the contractor will be required to perform and itemize what the contractor is expected to accomplish. **REMINDER:** You are buying the contractor’s time and effort, not a specific product.
2. **MODIFICATIONS:** All vendors contacted must be given the opportunity to bid on the identical specifications/scope of work. For example, if during the bidding process a vendor offers an alternative (not an equivalent) and the end user determines that the alternate would suffice, then each vendor previously contacted must be provided the revised requirement and allowed to bid.
3. **FINAL SCOPE OF WORK:** The final product of your discussions with vendors **MUST** be transferred exactly to the PO. The scope of work becomes the basis for performance by the contractor, measurement of that performance by the agency, and the means by which the user’s need is ultimately satisfied.
4. **NOTATIONS:** When soliciting bids on a brand name specified or equivalent basis, note on the phone quote sheet the product offered by each vendor, i.e., “as specified” or make, model of equivalent. When soliciting bids using generic specifications, note the make and model offered by each vendor.
5. **TERMS AND CONDITIONS:** If the vendors are registered with the Commonwealth, you can assume familiarity with the procedures outlined in the *Vendors Manual*. In soliciting telephone bids, be sure vendors are made aware of any general and special terms and conditions which will apply to the procurement.
6. **PRICING FACTORS: GOODS:** Bids are to be solicited on a firm fixed price basis. Every attempt should be made to have the prices quoted F.O.B. destination and to include any shipping and handling charges in the total price. Otherwise, any separate charges must be shown on the Telephone Record and included as part of the total bid price when evaluating the bids. **NONPROFESSIONAL SERVICES:** Major elements of the price of service(s) provided may need to be itemized, e.g., materials, labor rates, travel, etc. If multiple pricing factors are involved, e.g., labor rates, discounts off price lists, unit prices, and/or lump sums, be sure to have a clear and understandable bid evaluation procedure established.