

**Internal Policies and Procedures
of the
Utah State Board of Education**

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| Policy #: | 06-09 |
| Subject: | Solicitation Requirements |
| Date: | June 28, 2022 |
| Policy Owner: | Director of Purchasing and Contracts |
| Policy Officer: | Deputy Superintendent of Operations |
| References: | |
| <ul style="list-style-type: none"> • Utah Code Annotated, Title 63G Chapter 6a, Utah Procurement Code • Utah Administrative Code Title R33 • Utah Administrative Code Title R277-122 | |

I. **PURPOSE:**

To provide uniform best practices and procedures for Utah State Board of Education (“USBE”) staff to effectively develop solicitation documents.

II. **POLICY:**

USBE Purchasing will work with the applicable section and stakeholders to develop the appropriate solicitation documents for the correct procurement process in order to create effective contracting documents.

III. **PROCEDURES:**

1. The requesting section shall complete a questionnaire for the following procurement processes, and when requested by Purchasing: Request for Proposals, Invitation for Bids, and Approved Vendor Lists.
2. The requesting section shall work with the assigned purchasing agent to develop the appropriate specifications, scope of work, objective, and subjective evaluation criteria, and determine appropriate terms and conditions. These documents will be the basis for the awarded contract resulting from this solicitation.

3. Purchasing will draft the solicitation in the e-procurement system and shall work with the requesting section before releasing the solicitation.
4. The requesting section will be required to be the content expert for the specifications, requirements, and other technical aspects of the solicitation. If posted to the e- procurement system, the requesting section will be required to answer any technical questions asked by vendors in a timely manner.

The contracted scope of work may not include goods or services outside the scope of the general description of the procurement items contained in the solicitation and the vendor's response. The requesting section must ensure the specifications/scope accurately and sufficiently reflect the procurement needs of the section.

IV. **HISTORY:**

The effective date of this policy was January 19, 2018. On June 28, 2022, this policy was formatted to comply with USBE Internal Policy 00-01.