

BOOK REVIEW

Handbook for Writing Bids and RFP's, by Karen Theriault (The Procurement Connection, Inc., Oakhurst CA, spiral-bound, without ISBN, 350 pages, \$65.00).

As the title "Handbook for Writing Bids and RFP's" indicates, Karen Theriault's book is a handy toolkit for the use of professional public procurement managers. Written by a twenty-year veteran of government purchasing, this handbook presents a complete set of master terms, conditions, and bid documents that can be customized for each solicitation to simplify the work of the procurement professional. More specifically, the Handbook aims to demonstrate how to (a) use, customize, and individualize the Bid and Request For Proposal (RFP) Masters, (b) develop informal quotes, solicitation, Request for Proposals, and public work bids; and, (c) how to add special terms for other solicitations. Accompanying this handbook is a compact disc that contains all the Bid and RFP Masters found in the Handbook. Also on this compact disc are examples of various bid solicitations.

The author accomplishes these objectives by first laying out some descriptions and definitions of various terms in the introduction. Included are definitions and descriptions of terms such as bonds (i.e. bid security bonds, payment bonds, and performance bonds), invitation for bids (IFBs), the differences between formal and informal bids, liquidated damages, public works bids, request for proposals (RFPs), and request for quotations (RFQ). The handbook is subsequently divided into five sections. These sections, marked by tabs and accompanied by their own table of contents page for easy reference are Quotes, IFBs, RFPs, Public Works, and Other. In each of the first four of these sections, there is a brief introduction that provides the purpose

of the section, instructions, and information about the area. This is followed by a list of terms and conditions that can be used by a procurement manager or agency for RFQs, IFBs, RFPs, etc. Included in this list are instructions for the bidder/proposer, specific terms and conditions, a list of special provisions for materials and equipment and special provisions for non-construction services, optional clauses, additional forms, and one or more examples of the scope of the work or detailed specifications. Included in the introduction to each section is some information about the substantive issues and some discussion on the procurement process itself. For instance, the introduction to the section on RFPs, first discusses the purpose of competitive proposals, the legal requirements for such proposals, the definition of a "Request for Proposals," and the differences between Request for Proposals and Invitations for Bids. Also included is a discussion on the types of contracts and pricing, the terms of contracts, and a checklist for developing RFPs.

All procurement issues related to construction are addressed in the Public Works section. The section titled 'Other' includes instructions on developing other kinds of solicitations such as Two-Step Bids, Annual Requirements Bid Solicitations, and Life-Cycle Bid Solicitations. This section differs from the other sections in the Handbook. Rather than providing for a complete bid master for other kinds of bids, the author provides clauses specific to other bids and explanations on how to use them.

This book represents a handy volume and toolbox for most procurement professionals. It is clearly arranged and written with an eye toward the needs of procurement managers. Moreover, since it addresses the major tasks faced by any procurement manager in some detail, it is a useful toolkit for the specialist. Ms. Theriault's own credentials as a twenty-year veteran of government purchasing, who also holds a Juris Doctor Degree from the Santa Barbara College of Law, lend additional credence to the source material. A particularly useful feature of the Handbook is the compact disc that accompanies it. The master documents found on the compact disc (in MS Word format) can be customized for use by most agencies fairly easily. This feature provides an easy, ready-to-use tool for procurement managers, and this

alone, renders it a very good source to reference, justifying the \$65.00 price of this Handbook.

That being said, the main factor attenuating the utility of this workbook lies in that it is based on California's rules and regulations. Different states have different rules and regulations governing procurement and a great deal of variation exists across states in procurement practices. In light of that, the generalizability and usefulness of this handbook in setting out master documents that can be customized for use by procurement managers from other states as well may be limited. For instance, procurement of professional services is highly complex and governed by an entirely different statute (that RFPs and IFBs) in the state of Florida (Florida Statute 287.055). Under the Consultants Competitive Negotiation Act (CCNA) in Florida, consultants bidding for service contracts are evaluated in an entirely different fashion and require a different process from those of other states. Even though a long list of clauses and conditions has been included, they are nonetheless limited in their scope.

Another related shortcoming of this book is that it does not take into account more recent procurement processes that have been developed. For instance, most states, including Florida, now have an Invitation to Negotiate (ITN) procurement process to acquire commodities and services. The author does not address or develop instructions for this process, limiting again the usefulness of this Handbook.

Notwithstanding these shortcomings, the author does a good job in developing the terms and conditions for various procurement processes. Overall, with the inclusion of the user-friendly compact disc containing master documents that can be customized for use, this handbook will be a useful tool for practitioners and procurement managers.

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