

Request for Formal Solicitation

This form shall be utilized when requesting a formal solicitation process in excess of \$40,000.

BOR APPROVAL

If either of the below criteria is met, this contract requires TWU Board of Regents approval

- Contract value is estimated to be greater than \$500,000 per year.
- Contract involves the commitment of resources for more than four (4) years

BOR meeting date approval: _____

Proposed Contract Term: _____ YEARS _____ MONTHS

Dollar amount budgeted for the life of the Contract (including renewals)? _____

CONTACT INFORMATION

Owner of Solicitation: _____
(the individual requesting the goods or services)

Department: _____

BACKGROUND

Please provide a complete description of the background and events leading up to this request - Describe current state of how needs are met.

NEEDS ASSESSMENT

Why do we need this product and/or service? Will this impact any statutory requirements or business processes?

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SCOPE OF WORK

Provide a detailed description of the project and/or services for which the supplier will be responsible.

PROJECT DETAILS

Provide a detailed, thorough description of the project or service.

MANDATORY REQUIREMENTS

List mandatory requirement the supplier must provide in their proposal (ie. must respond within 24 hours, provide dedicated customer service representative, quarterly reports, reviews, remediation requirements, etc.) NOTE: Any proposers not meeting the requirements/conditions listed are subject to disqualification.

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PREFERRED REQUIREMENTS

List any preferred, not mandatory, requirements the supplier will be responsible for providing.

COMPENSATION & FEES

How do you want the proposers to submit pricing (ie. provide your hourly billable rate, provide pricing for each phase, provide monthly cost for 12 months, provide cost for each item).

EVALUATION CRITERIA

Provide the evaluation criteria for which you will score the proposals. There should be 4-5 criteria and the total score must equal 100 points (ie. Experience - 20 pts, Timeline - 20 pts, Experience with Similar projects of similar size and scope - 25 pts, etc).

EVALUATION TEAM

The evaluation team should be comprised of an odd number of members including at least three individuals who are stakeholders in the final product or service. We do not recommend over 5 total.

1

5

2

6

3

7

4

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PRE-SOLICITATION MEETING

Would you like to conduct a pre-solicitation meeting?

Pre-solicitation meetings may be needed to view building space or clarify a complicated Scope of Work.

Yes

No

If yes, Date: _____

Location: _____

Time: _____

Meeting space must be reserved by department prior to Procurement Department posting solicitation

SUPPLIERS TO RECEIVE NOTIFICATION OF SOLICITATION:

The companies listed on this form have not given, offered to give, or intend to give at any time hereafter any economic opportunity, future employment, gift, loan, gratuity, special discount, trip, favor, or service to a public servant in connection with any submitted bid, proposal, or contract.

The undersigned TWU official does not have a financial, personal, or business interest in a vendor whose products or services are being considered for purchase at the university or campus. Any conflict shall be disclosed to prevent any real or perceived conflict of interest.

I certify that the statements contained in this document are true and correct.

Approval: Director level or above

Approval: Procurement & Contract Services