



## Procurement & Contract Services

### Request for Solicitation Form

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

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

**Department:**

**Name of Solicitation:**

**Need Goods or Services by:**

**Solicitation Type (see definition page):**

IFB

RFO

RFP

RFQ

**What is the total proposed contract term?**                      Years                      Months

**The proposed contract is a:**                      revenue contract                      expenditure contract

**If expenditures are required, how much is budgeted to spend over the life of the Contract, including renewals?**

The following contracts require TWU Board of Regents approval (please check if applicable):

*Contract value is estimated to be greater than \$500,000 per annum*      Yes                      No

*Contract involves the commitment of resources for more than four years that does not contain a 120 day or less out clause.*      Yes                      No

*Contract for consultant services greater than \$25,000*      Yes                      No

**Do you know whether a resulting Contract will require BOR approval?**      Yes                      No

**Date BOR approval received:** \_\_\_\_\_

**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.):*

- |    |    |
|----|----|
| 1. | 5. |
| 2. | 6. |
| 3. | 7. |
| 4. |    |

**Would you like to conduct a pre-solicitation meeting?** Pre-solicitation meetings may be established prior to Opening Date to clarify a complicated Scope of Work.

Yes

No

If yes: date / location / time



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Name:

- 1.
- 2.
- 3.
- 4.
- 5.

- 6.
- 7.
- 8.
- 9.
- 10.

1. Please provide a narrative for the purpose of the Solicitation including the departmental need for the proposed Contract.
2. Please provide Goods or Services specifications (may be attached).
3. Please provide a list of criteria for selecting a Contractor. Criteria may include but is not limited to Contractor qualifications, experience, resources, and references.



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4. Please detail the desired pricing structure for the Goods or Services (e.g. fixed sum, unit pricing for use as needed, etc.) and frequency (e.g. monthly, weekly annually). Should the Contract allow for reasonable pricing increases based on economic indicators?

5. Distinguish what provisions of the Specifications are preferred and what are mandatory.

6. Provide specific information of any standards of quality and quantity for the expected Goods or Services.

7. Provide any other information that should be considered when developing the Scope of Work.

**Definitions**

**Addendum:** An addition, change, or supplement to a solicitation document issued prior to the opening date.

**Bid:** An offer to Contract with TWU, submitted in Response to a bid invitation.

**Consultant:** A person that provides or proposes to provide a consulting service.

**Consulting Services:** Practice of studying and advising a state agency in a manner not involving the traditional employer/employee relationship per [Texas Government Code, Section 2254.021](#) (See Major Consulting Services Contract).

**Contract:** A written agreement where a contractor provides goods or services and the agency pays for such goods and services in accordance with the established price, terms and conditions.

**Contract Administration:** Following the award of a Contract, the department level actions to oversee full compliance with all of the terms and conditions contained within a Contract.

**Contract Administrator:** The Contract Administrator is the department level individual responsible for adherence to all provisions contained within a Contract and for managing the performance of a Contract.

**Contract Manager:** An individual who is: 1) employed by TWU in the Procurement and Contract Services Department and 2) is responsible for coordinating the processes required for effective Contract Management. The Contract Manager will provide guidance to Contract Administrators.

**Contract Review Team:** A team comprised of such members as the Vice President of Finance and Administration, the Chief Procurement Officer, the Contract Administrator, and as needed, cross-functional members such as: subject matter experts, information technology, risk management, legal, and price/cost analysts. The size and the members of the team are dependent on the nature, complexity and cost of the project.

**Contractor:** An entity or individual that has a Contract to provide Goods or Services to TWU.

**Goods:** Supplies, materials, or equipment as defined in [Texas Government Code § 2155.001](#). Goods do not include Services or real property.

**Invitation for Bids (IFB):** A Procurement process used when the requirements are clearly defined, Negotiations are not necessary, and price is the major determining factor for selection.

**Major Consulting Services Contract:** A consulting services contract for which it is reasonably foreseeable that the value of the contract will exceed \$25,000.

**Opening Date:** The date and time, after submission of Proposals, when sealed Proposal Responses are opened.

**Posted Date:** The date a procurement document is made available to the public.

**Proposal:** An executed offer submitted by a respondent in response to a Request for Proposals (RFP) and intended to be used as a basis to negotiate a contract award.

**Proposal Opening:** The public opening of proposals, in which the names of the respondents to a solicitation are publicly read and recorded. No prices are divulged at a proposal opening as these types of solicitations are subject to negotiation.

**Request for Offer (RFO):** A solicitation for automated information systems (which may include a request for hardware, software and other information technology goods and services) requesting the submittal of an offer in response to the required scope of services, including a cost proposal. Negotiations are allowed between a proposer and the issuing agency.



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**Request for Proposal (RFP):** A Solicitation requesting submittal of a Proposal in response to the required Specifications and usually includes some form of a cost Proposal. The RFP process allows for Negotiations between a Proposer and TWU.

**Request for Qualifications (RFQ):** A Solicitation document requesting submittal of Qualifications in response to the scope of Services required.

**Scope of Work (or "SOW"):** A detailed, written description of the conceptual requirements contained within the Specifications.

**Service(s):** The furnishing of labor, time, and effort by a Contractor or Auxiliary Enterprise, including for a Construction Project, which may involve to a lesser degree, the delivery or supply of products.

**Solicitation:** A method or process used to obtain Responses for the purpose of gathering information or entering into a Contract.

**Solicitation Conference:** A meeting chaired by the Purchasing Office or Contracting Office which is designed to help potential Respondents understand the requirements of a Solicitation. May also be known as a Pre-Bid Conference, Pre-Solicitation Conference, or Pre-Proposal Conference.

**Subject Matter Expert (SME):** A person who is an authority in a particular area or topic.

**Term Contract:** A Contract that addresses the estimated requirements for a number of agencies for supplies or services that are used repeatedly or in significant quantities over a period of time. Agencies place orders directly with term contract vendors for the quantity needed.

**Vendor:** A business entity or individual that has a contract to provide goods or services to the State of Texas. Used interchangeably with the term "contractor."