

# SOLICITATION REQUEST FORM

Department/Appendix Name: \_\_\_\_\_

Acquisition Name: \_\_\_\_\_

Description of Need:

Estimated Total Contract Value/Total Budget: \_\_\_\_\_

Is this a re-solicitation for an existing contract? \_\_\_\_\_

If "Yes", what is the current Contract Number? \_\_\_\_\_

When does the contract expire? \_\_\_\_\_

Is this a solicitation for a new contract? \_\_\_\_\_

If "Yes", what is the desired Start Date? \_\_\_\_\_

## 1. Contacts

Name, phone number and email addresses of the individuals to be kept informed of the status and progress of the procurement. At a minimum, include the Project Manager(s).

Name: \_\_\_\_\_

Phone: \_\_\_\_\_

Email: \_\_\_\_\_

Name: \_\_\_\_\_

Phone: \_\_\_\_\_

Email: \_\_\_\_\_

Name: \_\_\_\_\_

Phone: \_\_\_\_\_

Email: \_\_\_\_\_

## 2. Acquisition Planning/Market Research

By submitting this form, you are certifying that you have conducted appropriate acquisition planning/market research in compliance with SC Code of Regulations 19-445.2017, and allowed the Agency Procurement Officer the opportunity to fully participate in all aspects of any pre-solicitation activities conducted.

Check the appropriate boxes for completed activities:

Pre-solicitation Meeting with Agency Procurement	Individual Vendor Meetings - Provide # of vendors:
Industry Conference(s)	Draft RFP shared with vendors
Request for Information	Review of publicly available market/product information
Existing contract	
Other (Describe):	

Attach copies of the relevant documentation/information when submitting the Shopping Cart.

## 3. Source Selection Method

Check the appropriate Source Selection Method and attached the determination when submitting the Shopping Cart.

Invitation for Bid (IFB) – No justification required.

Fixed Price Bidding (FPB) - Determination for Competitive FPB included (Ref. State Code of Laws 11-35-1525(1)).

Best Value Bidding (BVB) - Determination for Competitive BVB included (Ref. State Code of Laws 11-35-1528(1)).

Online Bidding - Determination for Competitive Online Bidding included. (Ref. State Code of Laws 11-35-1529(1)).

RFP - Determination for Competitive Sealed Proposals included. (Ref. State Code of Laws 11-35-1530(1)).

Competitive Negotiations - Determination for Competitive Negotiations included. (Ref. State Code of Laws 11-35-1535(A)). Competitive negotiated acquisitions may be conducted only by the Division of Procurement Services (DPS). Contact DPS to discuss this source selection method.

If selecting either BVB or RFP as the Source Selection Method, attach a list of all panel members and Subject Matter Experts including their titles and contact information when submitting the Shopping Cart.

#### **4. Contract Term**

Check the appropriate boxes and attach the justification to the Shopping Cart.

One-Time Buy - No justification necessary.

Contract term is for one (1) year or less (i.e., contract with an initial term of 1 year with up to four (4) one-year renewals) - No justification necessary.

Contract term exceeds one (1) year - Multi-term written determination required.

Initial Contract Term - Duration of the initial contract period: \_\_\_\_\_

Number of Renewal Terms - Number of times the contract should renew after the initial contract term expires: \_\_\_\_\_

Maximum Contract Term: Proposed Start and ending dates of contract:

Start: \_\_\_\_\_ End: \_\_\_\_\_

Contract term exceeds five (5) years but not seven (7) - The contract term must be approved by the State Chief Procurement Officer and a copy of the approval must be attached to the Shopping Cart.

Contract term exceeds seven (7) years - The Contract term must be approved by the State Fiscal Accountability Authority (SFAA).

## 5. Recommended Vendors List

Provide list of any vendors who may be interested in responding to the solicitation. If the list is longer than four (4) vendors, attach a copy of the list to the Shopping Cart.

Vendor: \_\_\_\_\_

Contact: \_\_\_\_\_

Email: \_\_\_\_\_

Vendor #: \_\_\_\_\_

Vendor: \_\_\_\_\_

Contact: \_\_\_\_\_

Email: \_\_\_\_\_

Vendor # \_\_\_\_\_

Vendor: \_\_\_\_\_

Contact: \_\_\_\_\_

Email: \_\_\_\_\_

Vendor # \_\_\_\_\_

Vendor: \_\_\_\_\_

Contact: \_\_\_\_\_

Email: \_\_\_\_\_

Vendor # \_\_\_\_\_

## 6. Information Technology Procurements

If the purchase exceeds \$50,000, attach a copy of the Agency's approved IT Plan to the Shopping Cart.

Check the appropriate boxes for IT item(s) being procured:

Hardware	On-premises software / Commercial Off-The-Shelf (COTS)
Software as a Service (SaaS)	Customized Software (on-premises)
Professional Services	Customized Software (Hosted / Cloud)
Other (Describe):	

## 7. Solicitation Document

This portion of the Solicitation Request Form parallels the Uniform Solicitation Format laid out in the Procurement Compendium. This outline was adopted by the DPS to standardize the organization of all solicitation documents.

### I. Scope of Solicitation

- State the intent of the solicitation and general description of the products or services to be acquired.
- Introduction: History/Background – Provide a brief history of how the need for this program/project/service evolved in order to give vendors a better understanding of the requirements.

### II. A & B - Instructions to Offerors – General Instructions

- The Procurement Officer will complete these sections of the solicitation.
- Pre-Opening Conference

None

Non-mandatory Pre-Bid / Pre-Proposal Conference

Site Visit - Site Visit Location:

If by appointment only, Site Visit Contact information:

---

Mandatory Pre-Bid / Preproposal Conference – Attach the Determination to the Shopping Cart (Ref. State Code of Regulation 19-445.2042).

### III. Scope of Work / Specifications

- Attach the Scope of Work/Specifications to the Shopping Cart. The attachment should be in Word format. Include the delivery location and any specific instructions regarding delivery.

### IV. Information for Offerors to Submit

- Attached the list of information for Offerors to submit to the Shopping Cart. This may be included in the same attachment as the Scope of Work/ Specifications but as a separate section.

V. Qualifications

- Is there a required Special Standard of Responsibility or Mandatory Minimum? \_\_\_\_\_
- If “Yes, describe:

VI. Award Criteria:

- List the items that will be evaluated/scored along with each item’s assigned weighting:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

VII. A - Terms & Conditions – General:

- The Procurement Officer will complete this section of the solicitation.

VII. B. Terms & Conditions – Special:

- Do you want to limit the Contractor’s liability? \_\_\_\_\_
  - If “Yes”, What is the dollar value of the cap of the Contractor’s liability:

\_\_\_\_\_

*Note: DPS has prepared guidelines and related materials for evaluating risk when contracting, and for determining whether to limit a contractor’s liability. The guidelines, clauses and guidance, and clause text can be found at [www.procurement.sc.gov/legal/proc-docs#ditem2449](http://www.procurement.sc.gov/legal/proc-docs#ditem2449) (Risk Analysis and Limiting Contractor’s Liability).*

- What levels of coverage for general liability insurance is required by the Contractor? \_\_\_\_\_ per occurrence

*Note: The default levels of coverage for Commercial General Liability, Automobile, and Workers' Compensation are \$1M per occurrence.*

- Does the Contractor need liability insurance for information security and privacy? \_\_\_\_\_
  - If "Yes", provide the coverage limits: \_\_\_\_\_ per occurrence and \_\_\_\_\_ aggregate.

*Note: Default level of coverage is \$5M per occurrence and \$10M aggregate. You may wish to increase or decrease this based upon the type of information to which the Contractor will have access, the potential ramifications if that information is breached, and the Agency's acceptable level of risk.*

Attach to the Shopping Cart the text of any required specific Federal, grant related, or other clauses not included in the Compendium.

#### VIII. Bidding Schedule / Price-Business Proposal

- Are the line items that make up the bidding schedule listed in the Shopping Cart? \_\_\_\_\_

If "No", attach the bidding schedule or business proposal format to the Shopping Cart.

#### IX. Attachments to Solicitation

Solicitation attachments may be in multiple formats (e.g., Excel, Word, .pdf, .tif).