


**PROCUREMENT  
SERVICES**

 TEXAS TECH  
 Administration & Finance  
 Financial & Business Services

## Procurement Services Request for Solicitation Process

This form shall be utilized when requesting a formal solicitation process (RFP, IFB, RFI, RFQ) for the procurement/contracting of goods and services in excess of \$100,000 in accordance with TTU [Operating Policy 72.09 Procurement of Goods and Services](#). The process may be used for solicitations less than \$100,000 upon approval from the Section Manager or the Project Manager of Strategic Acquisition.

If this is a solicitation request to replace an existing contract or procurement, the department should prepare a [Vendor Performance Form](#) prior to the start of the new solicitation process.

Date of request: \_\_\_\_\_

Name of solicitation: \_\_\_\_\_

Name of requestor: \_\_\_\_\_

Primary project contact(s): \_\_\_\_\_ Department: \_\_\_\_\_

Preferred contract start date or date goods/services are needed: \_\_\_\_\_

Requested Solicitation Type (see definition page):

IFB            RFP            RFQ            RFI

List the institutions included in the solicitation (check all that apply):

TTU            TTUS            TTUHSC            TTUHSC-EP            ASU            MSU

Is there an existing contract?

Yes            No            Contract Number: \_\_\_\_\_ Expiration date: \_\_\_\_\_

Current Contractor/Vendor: \_\_\_\_\_

What is the total proposed contract term (length of term including renewals)? Years \_\_\_\_\_ and/or Months \_\_\_\_\_

The proposed contract is a:

Revenue Contract            Expenditure Contract            Includes Both Revenue and Expenditures

What is your expected budget for this Solicitation/Contract?

Annual Spend \_\_\_\_\_

Are funds currently available? If not, please explain. Provide the FOP(s) to be used.

What department is responsible for payment?



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**Proposed Contract Review Team.** *(This team must be at least three members; no more than three members can be from the requesting department. If the team is composed of more than threemembers, the team will include an odd number and at least two members from TTU/TTUS departments other than the requesting department). Procurement Services shall designate and approve the team members:*

Name:

Department:

Email address:

1.	_____	_____	_____
2.	_____	_____	_____
3.	_____	_____	_____
4.	_____	_____	_____
5.	_____	_____	_____
6.	_____	_____	_____
7.	_____	_____	_____

**List of potential Vendors/Contractors:**

Name:

Email address:

1.	_____	_____
2.	_____	_____
3.	_____	_____
4.	_____	_____
5.	_____	_____
6.	_____	_____
7.	_____	_____



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## SCOPE OF WORK DEVELOPMENT

*Please provide as much detail as possible. To simplify the process, you may attach supporting documents to provide the information requested below.*

### 1.1 Needs Assessment

Describe the business reason(s) for initiating the Solicitation, specifically stating the business purpose.

### 1.2 Project Details

This section should include, as applicable: summaries of the needs and task analyses, summaries of project organization and reporting relationships, listing of expected deliverables, challenges facing the successful Respondent, required methodologies, and location(s) of the work.

### 1.3 Mandatory Requirements/Conditions

Outline the items that the Respondent must provide.

Examples: Proven expertise in providing resources to meet the requirements of the project, a track record in partnering with higher education entities and others involved in the project, availability to provide the services required at the time required, and sufficient resources/staff with the relevant skills for the project.

### 1.4 Preferred Requirements/Conditions

Outline the items that are preferred (would be ideal to have, but not critical) that the successful Respondent should include.

### 1.5 Timeline

Include specific dates for completion of milestones such as analyses, design plans, test sessions, deliverables, etc.

**1.6 Prime Contractor/Vendor Responsibilities**

Necessary skills, experience, coordination of services, facilities, staff qualifications, supervision, training, and service delivery, etc.

**1.7 Quality Measures**

Include specific information of standards of quality and quantity and TTU's criteria for measuring/assessing the success and progress of the project. If appropriate, request that the Respondent describe their own plans for quality assurance and evaluation, including methodology.

**1.8 Special Terms and Conditions**

Define any special terms and conditions to be included in the Contract that will influence the risk factor (i.e., special certifications, credentials, and/or licensing requirements, years of experience, TTU timeline, expected delivery or other factors).

**1.9 Potential Risks**

Identify potential risks related to the procurement/Contract. Consider all major contract risks, including information security risks.

**1.10 Evaluation Criteria and Weights (used only with RFP and RFQ processes)**

Each Proposal shall be evaluated on the ability to meet TTU's requirements and provide the Best Value to TTU. The Respondent shall be awarded points to each of the following evaluation criteria.

The evaluation will be based on the following: *(Select at least four (4) or more criteria and assign each a weight. The following is just a suggested list; criteria can be removed or added.*

Qualifications of the Proposer.....	points
Pricing Proposal.....	points
Value added options.....	points
Number and scope of conditions attached to the Proposal.....	points
Quality of resources available for delivering the Goods or Services.....	points
Availability of Contractor's personnel, equipment, or facilities.....	points
Quality, availability, and adaptability of Contractor's supplies, materials, or equipment.....	points
Ability, capacity, and skill of Proposer to provide the Services required.....	points
Range of previous relevant experience.....	points
Demonstrated ability to meet project timelines.....	points
Experience with Contracts of similar scope.....	points
Experience with higher education institutions.....	points
Reputation for personal and professional integrity and competency.....	points
Sufficiency of financial resources to perform or provide the Goods or Services Cost.....	points
Ability to provide reliable maintenance Contracts and support.....	points
Ability to provide future maintenance, parts, or Services.....	points
Availability of employee training.....	points
Other (please include additional criteria below)	

Total Points



### **Definitions**

**Bid:** An offer to Contract submitted in Response to an IFB.

**Contract:** A legally binding written agreement executed between the System or an Institution and a third party in which the parties agree to perform in accordance with the obligations therein. Contracts include, but are not limited to letter agreements, co-operative agreements, memorandums of understanding (MOU), Interagency Contracts, Interlocal Contracts, easements, licenses, leases, and Purchase Orders. [Regents' Rules Chapter 07](#).

**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. The CA will be responsible for the proper implementation of all contract specifications and contract requirements.

**Contract Manager:** An individual who is: 1) employed by TTU in the Strategic Acquisition Office or Contract management Office 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 Contract Manager, 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 and complexity of the project.

**Contractor:** An entity or individual that has a Contract to provide Goods or Services to the System or TTU. Contractor may also be referred to as the "Vendor."

**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.

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

**Request for Information ("RFI"):** A general invitation requesting information for a potential future Solicitation. The RFI is typically used as a research and information gathering tool for preparation of a Solicitation.

**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 TTU.

**Request for Qualifications ("RFQ"):** A Solicitation document requesting submittal of Qualifications in response to the scope of Services required. RFQ's are typically only used for Professional Services as defined in Texas Government Code § 2254 where qualifications are the only criteria. Prices cannot be obtained in the RFQ process.

**Respondent:** An individual or legal entity submitting a Response to a Solicitation.

**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 Goods.

**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 Strategic Acquisition Office or Contract Management Office which is designed to assist potential Respondents understand the requirements of a Solicitation. May also be known as a Pre-Bid Conference, Pre-Solicitation Conference, or Pre-Proposal Conference.