

Formal Solicitation Requirements – Design and/or Construction

This form may be requested by Purchasing for contracts over \$25,000 in order to assist in the creation of a formal solicitation document (RFP, RFQ, RFO, RFI, or ITB). This form is required for contracts over \$1 million. A meeting may be required between the department and the appropriate Buyer in Purchasing to complete the form. Contact your Buyer, if needed.

1. Brief description of Product/Service/Scope of Work.

2. What is the name of incumbent vendor, if applicable?

3. When does the current contract expire, if applicable?

4. Projected Cost or Revenue over the Life of this Contract, including all possible extensions. \$
Internal Audit Review Questions MUST be completed if over \$1M. See Purchasing's website under Forms
 - A. Will this contract require Board of Regents approval?
See Section VI: BOR Policy 55.01, Contracts: <https://uhsystem.edu/board-of-regents/policies/>

Board Approval Date:

 - B. Is this requirement subject to the Contract Advisory Team review?

 - C. Are any federal funds being used?

 - D. Account Code(s) that will be used for this contract:
(5-digit number starts with 5. ex: 5XXXX).
Contact DBA of Facilities Business Services for this information.

5. Project Manager (person responsible for overseeing the contract)

Name	Title	Email

6. Is a Pre-Proposal Meeting/Site Visit required for this solicitation?
 - A. Will the meeting be Mandatory?
 - B. Will the meeting be In-Person or Zoom?
 - C. If In-Person, where will the location be?
PM will reserve rooms for meetings.

7. Evaluation Criteria Requirements:
 - A. All RFPs (not RFQs) must contain a Cost Criteria.
 - B. Cost Criteria % must be between 30%-40%. 40%-50% must be approved.
 - C. Projects over \$10 million must include HUB as a criteria.

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8. List of evaluation committee members. Minimum of five committee members are required.
All members must complete the Conflict of Interest training and sign the "Evaluation Committee Member COI Form".

	Name	Title	Email
1			
2			
3			
4			
5			
6			
7			

9. List any vendors that should be invited to bid:

Business Name	Email

10. Is the Project Manager (see #3) aware of any information that was shared with a potential respondent in the past year that might give the respondent a competitive advantage in responding to the solicitation?

Date submitted to Purchasing

Signature of Project Manager