

SOLICITATION REQUEST FORM

Agency Name: _____

Acquisition Name: _____

Brief 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, when is the desired start date? _____

1. Contacts

Please provide the name, phone number and email addresses of the individuals you want kept informed of the status and progress of the procurement. We suggest you provide, at a minimum, the agency procurement official and the project manager(s).

Name: _____

Phone: _____

Email: _____

Name: _____

Phone: _____

Email: _____

2. Acquisition Planning/Market Research

Acquisition Planning/Market Research Checklist:

By submitting this form, you are certifying that your agency has conducted appropriate acquisition planning/market research in compliance with Regulation 19-445.2017 and your agency allowed the assigned Procurement Officer the opportunity to fully participate in all aspects of any pre-solicitation activities conducted by your agency.

Please check the appropriate boxes for completed activities:

| | |
|--|--|
| <input type="checkbox"/> Pre-solicitation Meeting with DPS | <input type="checkbox"/> Individual Vendor Meetings - Provide # of vendors _____ |
| <input type="checkbox"/> Industry Conference(s) | <input type="checkbox"/> Draft RFP shared with vendors |
| <input type="checkbox"/> Request for Information | <input type="checkbox"/> Review of publicly available market/product information |
| <input type="checkbox"/> Existing contract | <input type="checkbox"/> Other (please describe) |

Please provide relevant documentation / information as an attachment when submitting your Shopping Cart.

3. Source Selection Method

Please check the appropriate source selection method below and include your determination as an attachment when submitting your shopping cart.

- IFB – No justification required.
- FPB - Determination for Competitive Fixed Price Bidding included. (Ref. 11-35-1525(1))
- BVB - Determination for Competitive Best Value Bidding included. (Ref. 11-35-1528(1))
- Online Bidding - Determination for Competitive Online Bidding included. (Ref. 11-35-1529(1))
- RFP - Determination for Competitive Sealed Proposals included. (Ref. 11-35-1530(1))
- Competitive Negotiations - Determination for Competitive Negotiations included. (Ref. 11-35-1535(A)). Competitive negotiated acquisitions may be conducted only by the Division of Procurement Services. Please contact our agency to discuss this source selection method.

If selecting either BVB or RFP as your source selection method include a list of all panel members and subject matter experts, their titles and contact information as an attachment when submitting your shopping cart.

4. Contract Term

Please check the appropriate boxes below and include your justification as an attachment when submitting your shopping cart.

- One-Time Buy. No justification necessary.
- Contract term is for one year or less (i.e., contract with an initial term of one year with up to four one-year renewals). No justification necessary.
- Contract term exceeds one year. Multi-term written determination is included.

Initial Contract Term: Provide the duration of the initial contract period: _____

Number of Renewal Terms: Provide the number of times the contract should renew after the initial contract term expires: _____

Maximum Contract Term: Provide the proposed beginning and ending dates of contract:

Contract term exceeds five years but not seven. The contract term has been approved by the appropriate chief procurement officer and the approval is included.

Contract term exceeds seven years and has been approved by the State Fiscal Accountability Authority.

Note: If appropriate, the Division of Procurement Services staff will assist with seeking chief procurement officer or Authority approvals. Note: Approval of the maximum potential contract term duration must be granted before the solicitation may be published. (Ref. Code Section 11-35- 2030(2) and Regulation 19-445.2135, (D), (1), (2) and (3)).

5. Recommended Vendors List

Please provide any vendors that may be interested in responding to the solicitation. If the list is longer than 4 vendors, please include an electronic file as an attachment when submitting your shopping cart.

Vendor Name: _____

Contact Name: _____

Email Address: _____

Vendor Name: _____

Contact Name: _____

Email Address: _____

Vendor Name: _____

Contact Name: _____

Email Address: _____

Vendor Name: _____

Contact Name: _____

Email Address: _____

6. Information Technology Procurements

IT Approval Checklist:

Is your agency required to submit an IT Plan to the Department of Administration?
If yes, attach the approved IT plan for this procurement to the shopping cart.

IT Procurement:

Please check the appropriate boxes below for items being procured:

| | |
|---|---|
| <input type="checkbox"/> Hardware | <input type="checkbox"/> On-premises software/COTS |
| <input type="checkbox"/> Software as a Service (SaaS) | <input type="checkbox"/> Customized Software (on-premises) |
| <input type="checkbox"/> Professional Services | <input type="checkbox"/> Customized Software (Hosted/Cloud) |
| <input type="checkbox"/> Other (please describe) | |

7. Solicitation Document

This portion of the Solicitation Request Form parallels the Uniform Solicitation Format laid out in the Procurement Compendium. This outline has been adopted by the Division of Procurement Services 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 – A brief history of how the need for this program/project/service evolved can give vendors a better understanding of the requirements.

II. A. Instructions to Offerors – General Instructions

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

II. B. Instructions to Offerors – Special Instructions

- The assigned Procurement Officer will complete this section of the solicitation.
- **Pre-Opening Conferences**
Please check the appropriate boxes below.
 - None.
 - Nonmandatory Pre-Bid / Pre-Proposal Conference.
 - Site Visit. Site Visit Location:
If by appointment only, include the Site Visit Contact information
 - Mandatory Pre-Bid / Preproposal Conference. Include a written determination as an attachment when submitting your shopping cart. Ref. Regulation 19-445.2042

III. Scope of Work / Specifications

- Provide the Scope of Work/Specifications as an attachment to the shopping cart. The attachment should be in MS Word or another editable format. Include the delivery location and any specific instructions regarding delivery.

IV. Information for Offerors to Submit

- Provide the Information for Offerors to Submit as an attachment 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

- Do you require a Special Standard of Responsibility or Mandatory Minimum?
- If so, please describe: _____

VI. Award Criteria:

- List the items that will be evaluated/scored along with each items assigned weighting.

VII. A. Terms & Conditions – General:

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

VII. B. Terms & Conditions – Special:

Please check the appropriate boxes below:

Does your agency want to limit the Contractor’s liability?

If yes, provide the dollar value at which you agree to cap the Contractor’s liability: \$ _____

The Division of Procurement Services has prepared guidelines and related materials for evaluating risk when contracting, and for determining whether to limit a contractor’s liability. In addition, the Division has approved two new clauses. The guidelines, clauses and guidance, and clause text can be found at www.procurement.sc.gov/legal/proc-docs#ditem2449 “Risk Analysis and Limiting Contractor’s Liability.”

What levels of coverage for general liability insurance do you want/need the Contractor to have?

\$ _____ per occurrence. Our default levels of coverage for Commercial General Liability, Automobile, and Workers' Compensation are \$1m per occurrence.

Do you need the Contractor to have liability insurance for information security and privacy?

If yes, provide the coverage limits: \$ _____ per occurrence and \$ _____ aggregate.

Our 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 how risk-averse your Agency is.

If this procurement requires any specific Federal, grant related, or other clauses not included in the Compendium, please provide the text of the clauses in an attachment to the shopping cart.

VIII. Bidding Schedule / Price-Business Proposal:

- Are the line items that make up the bidding schedule listed in the shopping cart?
If no, please attach a bidding schedule or business proposal format as an attachment to the shopping cart.

IX. Attachments to Solicitation:

Include with your shopping cart any solicitation attachments you are providing. Attachments may be accepted in multiple formats (Microsoft Excel, Word, PDF, and "TIF" are readily usable).

NOTE: Attachments can’t be added to a shopping cart which is already approved. If you are unable to attach documents to the cart, these should be e-mailed to the appropriate team lead or procurement manager.