Elements
of a
Competitive Solicitation
for
Information Technology and Telecommunication Services

Element	$100,000 and Under	Request for Quotation (RFQ) $100,000.01-$1,000,000.00	Invitation for Bid (IFB) $100,000 and Under	Invitation for Bid (IFB) $100,000.01-$500,000.00	Invitation for Bid (IFB) Over $1,000,000	Request for Proposal (RFP) Over $1,000,000
			The IFB solicitation format is not to be used at these dollar thresholds. Use only the RFQ solicitation format.			
Advertising in CSCR	Required on transactions exceeding $4,999.99	Required			Required	Required
Solicitation method	ƒ Verbal– less than $5,000.00 documented phone script required. ƒ Written – exceeding $4,999.99 and may be distributed by fax, mail or electronic	Must be written with sealed bids required to be submitted.			Must be written with sealed bids required to be submitted.	Must be written with sealed bids required to be submitted.
Multi-step procurement procedure may include: ƒ Conceptual proposal ƒ Detailed technical report ƒ Revised detailed proposal ƒ Bid phase ƒ Draft bid (no cost data) ƒ Final bid	Not required	Not required			Not required but recommended for high risk transaction.	Required
Quote, Bid or Proposal due date	ƒ Verbal-upon oral contact or shortly thereafter and documented in phone script required. ƒ Written-as specified in the written solicitation.	Specific time and place as specified in the written solicitation. Bids received after the bid submission date and time may not be considered (non-responsive).			Specific time and place as specified in the written solicitation. Bids received after the bid submission date and time may not be considered (non-responsive).	Specific time and place as specified in the written solicitation. Bids received after the bid submission date and time may not be considered (non-responsive).

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Required contents	ƒ Date & time supplier response is due ƒ Request signature of authorized supplier representative ƒ Information on how the bid response is submitted ƒ Identify administrative requirements ƒ Identify technical requirements ƒ Any attachments to be submitted with bid response ƒ Cost forms or clear indication of cost placement in the solicitation ƒ Identify the evaluation criteria.	ƒ Date & time supplier response is due ƒ Request signature of authorized supplier representative ƒ Information on how the bid response is submitted ƒ Identify administrative requirements ƒ Identify technical requirements ƒ Any attachments to be submitted with bid response ƒ Cost forms or clear indication of cost placement in the solicitation ƒ Identify the evaluation criteria ƒ Must include Award of Contract and Protests RFQ language. (Chap. 4)			ƒ Date & time supplier response is due ƒ Request signature of authorized supplier representative ƒ Information on how the bid response is submitted ƒ Identify administrative requirements ƒ Identify technical requirements ƒ Any attachments to be submitted with bid response ƒ Cost forms or clear indication of cost placement in the solicitation ƒ Identify the evaluation criteria	ƒ Date & time supplier response is due ƒ Request signature of authorized supplier representative ƒ Information on how the bid response is submitted ƒ Identify administrative requirements ƒ Identify technical requirements ƒ Any attachments to be submitted with bid response ƒ Cost forms or clear indication of cost placement in the solicitation ƒ Identify the evaluation criteria
Administrative requirements	ƒ Provision for accepting faxed bids ƒ DVBE solicitation language & applicable DVBE participation attachment ƒ If DVBE is waived, a statement to that effect must be in solicitation. ƒ Non-SB claiming 25% SB participation ƒ Small business preference	ƒ Provision for accepting faxed bids ƒ DVBE solicitation language & applicable DVBE participation attachment ƒ If DVBE is waived, a statement to that effect must be in solicitation. ƒ Non-SB claiming 25% SB participation ƒ Small business preference			ƒ Faxed bids, not applicable ƒ DVBE solicitation language & applicable DVBE participation attachment ƒ If DVBE is waived, a statement to that effect must be in solicitation. ƒ Non-SB claiming 25% SB participation ƒ Small business preference	ƒ Faxed bids, not applicable ƒ DVBE solicitation language & applicable DVBE participation attachment ƒ If DVBE is waived, a statement to that effect must be in solicitation. ƒ Non-SB claiming 25% SB participation ƒ Small business preference

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Administrative Requirements (continued)						
Target Area contract Preference Act (TACPA)	ƒ Required for solicitations valued at $100,000 and over. ƒ Recommended for solicitations valued at $85,000 and over.	Required for solicitations valued at $100,000 and over.			Required for solicitations valued at $100,000 and over.	Required for solicitations valued at $100,000 and over.
~~Enterprise Zone Act (EZA)~~	~~ƒ Required for solicitations valued at $100,000 and over~~ ~~ƒ Recommended for solicitations valued at $85,000 and over.~~	~~Required for solicitations valued at $100,000 and over.~~			~~Required for solicitations valued at $100,000 and over.~~	~~Required for solicitations valued at $100,000 and over.~~
~~Local Agency Military Base Recovery Act (LAMBRA)~~	~~ƒ Required for solicitations valued at $100,000 and over.~~ ~~ƒ Recommended for solicitations valued at $85,000 and over.~~	~~Required for solicitations valued at $100,000 and over.~~			~~Required for solicitations valued at $100,000 and over.~~	~~Required for solicitations valued at $100,000 and over.~~
Administrative considerations as applicable to the transaction	ƒ DVBE Incentive ƒ Remedies for exception ƒ Customer references	ƒ DVBE Incentive ƒ Remedies for exception ƒ Customer references			ƒ DVBE Incentive ƒ Remedies for exception ƒ Customer references	ƒ DVBE incentive ƒ Remedies for exception ƒ Customer references

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Bidder Instructions (GSPD-451)	Required ƒ Verbal – less than $5,000.00 phone script must refer suppliers to the location on DGS/PD web page. ƒ Written – either by attaching hardcopy to solicitation or identifying in solicitation the location of the electronic version.	ƒ Written – either by attaching hardcopy to solicitation or identifying in solicitation the location of the electronic version. ƒ Must include Award of Contract and Protests RFQ language. (SCM 2, Chapter 4 & SCM 3, Chapter 3.			Section II – Rules Governing Competition replace the Bidder Instructions at this level.	Section II – Rules Governing Competition replace the Bidder Instructions at this level.
Model Contract Language (Referenced as "Attachments" not "Exhibits")						
Statement of Work (including Equipment and Delivery Schedules)	As applicable to the transaction. **If used:** Verbal – Less than $5,000.00 phone script must be documented. Written – required.	As applicable to the transaction. **If used** Written – required.			As applicable to the transaction. **If used** Written – required.	As applicable to the transaction. **If used** Written – required.
IT General Provisions (GSPD-401 IT)	Required ƒ Verbal – Less than $5,000.00 phone script must refer suppliers to the location on DGS/PD web page. ƒ Written – either by attaching hardcopy to solicitation or identifying in solicitation the location of the electronic version.	Written – required either by attaching hardcopy to solicitation or identifying in solicitation the location of the electronic version.			Written – required either by attaching hardcopy to solicitation or identifying in solicitation the location of the electronic version.	Written – required either by attaching hardcopy to solicitation or identifying in solicitation the location of the electronic version.

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IT Purchase Special Provisions	As applicable to the transaction. **If applicable:** ƒ Verbal – Under $5,000.00 phone script must refer suppliers to the location on DGS/PD web page. ƒ Written – either by attaching hardcopy to solicitation or identifying in solicitation the location of the electronic version.	As applicable to the transaction. **If applicable:** Written – either by attaching hardcopy to solicitation or identifying in solicitation the location of the electronic version.			As applicable to the transaction **If applicable:** Written – either by attaching hardcopy to solicitation or identifying in solicitation the location of the electronic version.	As applicable to the transaction. **If applicable:** Written – either by attaching hardcopy to solicitation or identifying in solicitation the location of the electronic version.
IT Maintenance Special Provisions	As applicable to the transaction. **If applicable:** ƒ Verbal – Under $5,000.00 phone script must refer suppliers to the location on DGS/PD web page. ƒ Written – either by attaching hardcopy to solicitation or identifying in solicitation the location of the electronic version.	As applicable to the transaction. **If applicable:** Written – either by attaching hardcopy to solicitation or identifying in solicitation the location of the electronic version.			As applicable to the transaction. **If applicable:** Written – either by attaching hardcopy to solicitation or identifying in solicitation the location of the electronic version.	As applicable to the transaction. **If applicable:** Written – either by attaching hardcopy to solicitation or identifying in solicitation the location of the electronic version.

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IT Software License Special Provisions	As applicable to the transaction. **If applicable:** ƒ Verbal – Less than 5,000 phone script must refer suppliers to the location on DGS/PD web page. ƒ Written – either by attaching hardcopy to solicitation or identifying in solicitation the location of the electronic version.	As applicable to the transaction. **If applicable:** Written – either by attaching hardcopy to solicitation or identifying in solicitation the location of the electronic version.			As applicable to the transaction **If applicable:** Written – either by attaching hardcopy to solicitation or identifying in solicitation the location of the electronic version.	As applicable to the transaction. **If applicable:** Written – either by attaching hardcopy to solicitation or identifying in solicitation the location of the electronic version.
IT Personal Services Special Provisions	As applicable to the transaction. **If applicable:** ƒ Verbal –Less than $5,000 phone script must refer suppliers to the location on DGS/PD web page. ƒ Written – either by attaching hardcopy to solicitation or identifying in solicitation the location of the electronic version.	As applicable to the transaction. **If applicable:** Written – either by attaching hardcopy to solicitation or identifying in solicitation the location of the electronic version.			As applicable to the transaction. **If applicable:** Written – either by attaching hardcopy to solicitation or identifying in solicitation the location of the electronic version.	As applicable to the transaction. **If applicable:** Written – either by attaching hardcopy to solicitation or identifying in solicitation the location of the electronic version.
Agency Special Provisions	As applicable to the transaction. **If applicable:** ƒ Verbal – Less than $5,000 phone script must refer suppliers to the location on DGS/PD web page. ƒ Written – include in solicitation.	As applicable to the transaction. **If applicable:** Written – providing in solicitation.			As applicable to the transaction. **If applicable:** Written – providing in solicitation.	As applicable to the transaction. **If applicable:** Written – providing in solicitation.

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Addenda	Verbal – Less than $5,000 must be addressed in phone script and documented. Written – ƒ Required to effect change to solicitation. ƒ Modified prior to the date fixed for submission of final bids ƒ Will be numbered consecutively ƒ Identify where and what changed.	Verbal – not applicable Must be written: ƒ Required to effect change to solicitation. ƒ Modified prior to the date fixed for submission of final bids ƒ Will be numbered consecutively ƒ Identify where and what changed.			Verbal-not applicable Must be written: ƒ Required to effect change to solicitation. ƒ Modified prior to the date fixed for submission of final ƒ bids ƒ Will be numbered consecutively ƒ Identify where and what changed.	Verbal-not applicable Must be written: ƒ Required to effect change to solicitation. ƒ Modified prior to the date fixed for submission of final ƒ bids ƒ Will be numbered consecutively ƒ Identify where and what changed.
Two sealed envelope evaluation procedure	Lowest net cost, not applicable Value effective, required	Lowest net cost, not applicable Value effective, required			Lowest net cost, not applicable Value effective, required	Lowest net cost, not applicable Value effective, required
Required number of bids that must be received.	Responsive quotes from at least two responsible suppliers, unless advertised.	Responsive quotes from at least two responsible suppliers, unless advertised. If advertised: One, with verification in accordance with the requirements and recommended practices in SCM, Vol. 3, Chapter 4.			One, with verification in accordance with the requirements and recommended practices in SCM 2, Chapter 4	One, with verification in accordance with the requirements and recommended practices in SCM 2, Chapter 4
Public bid opening	Lowest net cost, not required. Value effective, not applicable	Lowest net cost, not required. Value effective, not applicable			Lowest net cost, required. Value effective, not applicable	Lowest net cost not applicable. Value effective, not applicable
Public cost opening	Lowest net cost, not applicable Value effective, required	Lowest net cost, not applicable Value effective, required			Lowest net cost, not applicable Value effective, required	Lowest net cost, not applicable Value effective, required

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Evaluation Methodology						
Lowest net cost meeting all other bid specifications	Preferred solicitation format for this evaluation criteria	Preferred solicitation format for this evaluation criteria Must be a sealed bid.			Acceptable solicitation format for this evaluation criteria and Must be a sealed bid.	Not applicable
Value-effective	Acceptable solicitation format for this evaluation methodology and Must provide for a two envelope evaluation procedure	Acceptable solicitation format for this evaluation methodology and Must provide for a two envelope evaluation procedure			Acceptable solicitation format for this evaluation methodology and Must provide for a two envelope evaluation procedure	Acceptable solicitation format for this evaluation methodology and Must provide for a two envelope evaluation procedure.
Evaluation Phase						
Confidentiality statement (team/need-to-know participants)	Not required, but recommended whenever a team approach to developing solicitation requirements and/or evaluation is used.	Not required, but recommended whenever a team approach to developing solicitation requirements and/or evaluation is used.			Required.	Required.
Cost proposal certification	Lowest net cost, not applicable Value effective, required.	Lowest net cost, not applicable Value effective, required.			Lowest net cost, not required. Value effective, required.	Lowest net cost, not required. Value effective, required
Confidentiality of bids	Held in confidence until the purchase document is executed.	Confidential until the notice of intent to award is posted.			Confidential until the notice of intent to award is posted.	Confidential until the notice of award is posted.
Combined preferences threshold	The total of all preferences combined may not exceed 15% or $100,000 whichever is lower.	The total of all preferences combined may not exceed 15% or $100,000 whichever is lower.			The total of all preferences combined may not exceed 15% or $100,000 whichever is lower.	The total of all preferences combined may not exceed 15% or $100,000 whichever is lower.
Public inspection of quotes /or bids	Required	Required			Required	Required
Posting of the notice of intent to award	Not required.	Must be posted for 5 working days prior to award.			Must be posted for 5 working days prior to award.	Must be posted for 5 working days prior to award.

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Protest Process						
Protest of award	Not applicable	Department must allow for a protest period that allows any supplier to protest the solicitation requirements and for any bidder to protest the intent to award.			Department must allow for a protest period that allows any supplier to protest the solicitation requirements and for any bidder to protest the intent to award.	Department must allow for a protest period that allows any supplier to protest the solicitation requirements and for any bidder to protest the intent to award.
Alternative Protest Process	Refer to SCM, Vol. 3, Chapter 7	Refer to SCM, Vol. 3, Chapter 7			Refer to SCM, Vol. 3, Chapter 7	Refer to SCM, Vol. 3, Chapter 7
Documenting the Evaluation Results						
Bid/Quote Worksheet	Required	Required			Not applicable	Not applicable
Evaluation and Selection Report	Not applicable	Not applicable			Required	Required
Procurement Summary document	Required	Required			Required	Required