Elements
of a
Competitive Solicitation
for
Information Technology and Telecommunication Goods

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-$1,000,000	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	Not required but recommended for appropriate transactions.	Required			Required	Required
Solicitation method	Verbal–documented phone script required. Or Written, fax & 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 transactions. Not applicable, if straight forward bid using the Bidder Instructions in lieu of Section II or if using the IFB for IT Goods Only template and the evaluation and selection is based on lowest net cost meeting all other bid specification. Refer to SCM 3, Chapter 4	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 Seller Permit as applicable ƒ Small business preference ƒ Recycled content ƒ New equipment	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 Seller Permit as applicable ƒ Small business preference ƒ Recycled content ƒ New equipment			ƒ Fax 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 Seller Permit as applicable ƒ Small business preference ƒ Recycled content ƒ New equipment	ƒ Fax 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 Seller Permit as applicable ƒ Small business preference ƒ Recycled content ƒ New equipment

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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.
Administrative considerations as applicable to the transaction	ƒ DVBE Incentive ƒ Productive use requirements ƒ Customer in use requirements ƒ Remedies for exception ƒ Customer references	ƒ DVBE Incentive ƒ Productive use requirements ƒ Customer in use requirements ƒ Remedies for exception ƒ Customer references			ƒ DVBE Incentive ƒ Productive use requirements ƒ Customer in use requirements ƒ Remedies for exception ƒ Customer references	ƒ DVBE Incentive ƒ Productive use requirements ƒ Customer in use requirements ƒ Remedies for exception ƒ Customer references

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Bidder 1 Instructions (GSPD-451)	Required ƒ Verbal - 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.	Required: 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. (Chap. 4)			Section II – Rules Governing Competition replace the Bidder Instructions at this level. **Exception:** Bidder Instructions can be used if the procurement is straightward and the evaluation and selection is based on lowest net cost meeting all other bid specification. If used, multi-step process may not be used. Departments with purchasing authority at this level may use the IFB template for IT Goods Only in addition to the above criteria. Refer to SCM, Vol. 3, Chapter 4 .	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.	As applicable to the transaction.			As applicable to the transaction	As applicable to the transaction.
IT General Provisions (GSPD-401 IT)	Required ƒ Verbal - 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.	Required: ƒ Written – either by attaching hardcopy to solicitation or identifying in solicitation the location of the electronic version.			Required: ƒ Written – either by attaching hardcopy to solicitation or identifying in solicitation the location of the electronic version.	Required: ƒ Written – 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 - 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	Not applicable to an IT goods purchase.	Not applicable to an IT goods purchase.			Not applicable to an IT goods transaction.	Not applicable to an IT goods transaction.
IT Software License Special Provisions	As applicable to the transaction. **If applicable:** ƒ Verbal - 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	Not applicable to an IT goods transaction.	Not applicable to an IT goods transaction.			Not applicable to an IT goods transaction.	Not applicable to an IT goods transaction.
Agency Special Provisions	As applicable to the transaction.	As applicable to the transaction.			As applicable to the transaction.	As applicable to the transaction.

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Addenda	Verbal – 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 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.
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, Vol. 3	One, with verification in accordance with the requirements and recommended practices in SCM, Vol. 3
Public bid opening	Lowest net cost, not required. Value effective, not applicable	Lowest net cost, not required but recommended. 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 evaluation	Acceptable solicitation format for this evaluation methodology and Must provide for a two sealed envelope evaluation procedure	Acceptable solicitation format for this evaluation methodology and Must provide for a two sealed envelope evaluation procedure			Acceptable solicitation format for this evaluation methodology and Must provide for a two sealed envelope evaluation procedure	Acceptable solicitation format for this evaluation methodology and Must provide for a two sealed envelope evaluation procedure.
Evaluation Phase						
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 intent to award is posted.
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 applicable Value effective, Required
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 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 and Selection 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