The attached worksheet is designed to inform requesting departments of the information required to begin the formal solicitation process and to assist in the development of comprehensive specifications or statement of work (SOW).

**Section I, General Information** – This information is needed by the Purchasing Department to determine the method and instrument to be used for the procurement. The general information must be provided to the Purchasing Department as soon as possible because it is needed to establish the solicitation timeline. Do not wait until the SOW is completed to provide this information. The solicitation timeline is an integral part of ensuring that departments receive the requested supplies and/or services in the timeframe needed.

**Section II, Requirement Information** – This information does not need to be returned to the Purchasing Department. This section provides a series of questions which departments should consider as they begin to develop and write the SOW.

**Section III, Special Requirements** – This is an area on which notes can be made regarding any unique aspects of the requirement. Only use this section if applicable. Ensure that any special requirements notated here are included in the SOW.

**Section IV, Tentative Timeline** – This section serves several purposes. It allows the department to see all of the steps required during this process, the time required, and provides a place to write down the established timeline. Once the general information is received by the Purchasing Department the department will receive the tentative timeline. The department will have an opportunity to review and approve the timeline. Any significant delays in completing the SOW will be reflected in an adjusted timeline.

For assistance regarding formal solicitations or the use of this worksheet contact the Assistant Director of Business Services, at (254) 526-1668.
Central Texas College District
Solicitation Request Worksheet

I. GENERAL INFORMATION:

Requesting Department: __________________________ Date of Request: __________

Point of Contact(s): __________________________ Dollar Estimate: >$10k<$50K: ______
Phone Extension: __________ $50K: ______

Tentative Board Workshop Date: __________

Tentative Board Approval Date: __________
(All projects >$50K must be submitted to the Board of Trustees for a workshop discussion a
month prior to the requested month of approval.)

Any known Co-ops for services?: ______ Yes ______ No

Pre-Bid Conference/Site Visit Required?: ______ Yes ______ No
- Mandatory? ______ Yes ______ No *If mandatory, vendors not attending cannot submit a bid
(If a Pre-Bid Conference/Site Visit date is set, the department is responsible for arranging the
place on campus for the conference to be held and coordinating with the Multi-Media
Department to set-up the audio-visual and recording of the conference. The department will also
be responsible for the transcription of the conference information. The Purchasing Department
will issue an amendment to provide the content of the conference to all participating vendors. If
refreshments are desired during the pre-bid conference, the requesting department will also be
responsible for the cost and placing the order with Great Western Dining.)

Is this a new requirement?: ______ Yes ______ No
- If no, date current contract ends: __________ Incumbent Vendor: __________

Vendor Presentations Desired?: ______ Yes ______ No
(If a presentation date is set, the department is responsible for arranging the place on campus for
the presentations to be held. If refreshments are desired, the department will be responsible for
the cost and placing the order with Great Western Dining.)

Professional Service (If a license is required to perform service): ______ Yes ______ No
(If determined to be a professional service a Request for Qualification (RFQ) will be issued in
accordance with Purchasing Policy 100, Paragraph A of Section X. Special Provisions)

Is there more than one vendor who can perform this service: ______ Yes ______ No
(If no, a sole-source justification should be pursued in accordance with Purchasing Policy 100)
If yes, please provide a list of known vendors who can provide this service.

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II. REQUIREMENT INFORMATION

The items below are designed to assist departments in defining their requirement and developing a comprehensive statement of work.

1. **Specification/Statement of Work (SOW)** – A thorough description of service(s) and equipment/products needed. Describe **everything** that you want the vendor to provide. Include who, where, and when the services or products are to be performed or delivered. Include any licenses, certifications required. Address **warranty information**. Identify who will be responsible to certify that the service(s) have been received and are acceptable. Identify what CTCD will be responsible for in regards to the services rendered. Ensure that any document or attachment referenced in the statement of work/specifications is included as an attachment or appendix.

2. **Training Required** – If this is a requirement for a service or new equipment/system for which you want the vendor to provide training? If so, when, where (i.e. on-site, online, telephonically, etc.) and for how long?

3. **Pricing** - Do you want the vendor to provide their pricing per service, per year, hourly rate, etc. (This information will also assist the Purchasing Department develop the appropriate bid sheet to be included in the solicitation)

4. **Length of Service** – What will be the initial contract period or delivery period? Do you want the contract to have option periods/years? If so, how many periods/years? What is the requested or anticipated service start date?

5. **Evaluation Criteria** – Determine the primary aspects of the project and their importance. These aspects will become the basis of the evaluation criteria used to evaluate the proposals submitted by the vendors. Once the primary aspects have been identified the importance of each is established by assigning a weight to them. The total weight must equal 100%. The same primary aspects will be used in developing the evaluation instrument for the evaluation committee. If the identified aspects are not included in the solicitation, they cannot be used during the evaluation phase. Ensure that all essential aspects are included in your statement of work or specifications.

6. **Does this project involve coordination with any other department?**
   a) Facilities Management : _____Yes _____No
   b) Information Technology: _____Yes _____No

   ** Renovations of real property/facilities MUST be coordinated through Facilities Management. **
### III. SPECIAL REQUIREMENT:

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### IV. PROCUREMENT TIMELINE:

<table>
<thead>
<tr>
<th>TENTATIVE TIMELINE</th>
<th>ADJUSTED TIMELINE (If applicable)</th>
</tr>
</thead>
<tbody>
<tr>
<td>RFP Issue Date:</td>
<td>RFP Issue Date:</td>
</tr>
<tr>
<td>Advertisement Dates:</td>
<td>Advertisement Dates:</td>
</tr>
<tr>
<td>Pre-Bid Conference/: Site Visit</td>
<td>Pre-Bid Conference/: Site Visit</td>
</tr>
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<td>Bid due date:</td>
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<td>(If applicable)</td>
<td>(If applicable)</td>
</tr>
<tr>
<td>Service Start:</td>
<td>Service Start:</td>
</tr>
</tbody>
</table>

**This timeline will be provided by the Purchasing Department after receipt of the General Information in Section I, Page 2. Use this space to keep track for your records.**