

Formal Solicitation Requirements – Goods and Services

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:

Business Unit: UH-730 UH System-783

2. Projected Cost or Revenue over the Life of this Contract (including all possible extensions).

****The form Internal Audit's Review of Construction and Other Projects Over \$1Million MUST be completed on projects over \$1M. Visit the UH Purchasing website scroll over Forms and Templates under Miscellaneous Forms.**

Cost or Revenue

A. Will this contract require Board of Regents approval?

(See BOR Policy 55.01, Contracts: [UH System Board of Regents Policies - University of Houston System](#))

Yes

No

Board Approval Date:

B. What funds are being used?

Local

State

Federal

C. Account and Cost Center that will be used for this Contract. Contact your Business Services department for this information.

3. Project Manager (responsible for overseeing the contract, evaluating costs, and provides approval to post RFP documentation.)

Name	Title	Email

Secondary/Backup contact person:

4. Is a pre-proposal meeting / walk-through required for this solicitation?

Yes

No

Check if Mandatory

When and where will the meeting take place?

****PM will reserve rooms for meetings depending on the final dates of the RFP.**

5. List of evaluation committee members (minimum of 5)

****All committee members are required to have completed the Conflict of Interest training and will complete Conflict of Interest forms.**

Name	Title	Email

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6. List any vendors that should be invited to bid (email address):

Business Name	Email

7. Evaluation Criteria:

All projects must contain a Cost Criteria. A project over \$10 million must include HUB as a criteria.

Evaluation Criteria	%
Total	100%

Examples of Evaluation Criteria listed below:

- List purchase price (must be between 30%-40%). 40%-50% must be approved. The PM must create a cost analysis tool. Only the PM scores price.
- Reputation of the vendor and of the vendor’s goods or services
- Quality of the vendor’s goods or services
- Extent to which the goods or services meet UHS’ needs
- The vendor’s past performance with UHS
- Other: Provide Criteria.

8. For all IT projects that relate to Hosted Services, complete the **Information Security Hosted Services Contract Checklist**.

The form is located at: <https://uhssystem.edu/legal-affairs/contract-administration/contract-documents/department-specific-contracts-and-forms/>

Does this project relate to Hosted Services? Yes No

9. Is the Project Manager (named above) 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? Yes No

10. Are vendor reference checks to be conducted? Yes No

Signature of Project Manager: _____

Date submitted to Purchasing: _____

Signature of Purchasing Buyer: _____ Date: _____

****Internal Audit Review Questions MUST be completed on projects over \$1M. Visit the link below:****
<https://www.uh.edu/office-of-finance/purchasing/Forms/internal-audit-review-questions-for-projects-over-1m.pdf>