**Project Title: \_*\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_***

**Requistioner: *\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_***

**Department: \_*\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_***

On this template, enter/modify areas that are grayed and save as your own procurement specific document.

Please attach a print of your Starter Tool to this template when you submit it to Procurement Services.

**GOAL(s):** Enter a short paragraph stating the overall what, when, why, etc. of this procurement

*IMSA’s goal in this procurement is to ….*

**SPECIFICATIONS / QUALIFICATIONS / STATEMENT OF WORK**

1. **SUPPLIES AND/OR SERVICES REQUIRED**

List the detail line by line requirements of your purchase. Be as specific as you can to receive a good response. This section might include any performance metrics as well. Note, this section must synchronize with Number 9, your evaluation.

* 1. *Service or Item 1*
  2. *Service or Item 2*
  3. *Service or Item 3*
  4. *Add/Remove lines as needed*

1. **MILESTONES AND DELIVERABLES**

Milestones or delivery dates for item(s) from above. This section may well synchronize with section 11 Payment Terms and Conditions.

* 1. *Milestone 1*
  2. *Milestone 2*
  3. *Milestone 3*
  4. *Add/remove lines as needed*

1. **VENDOR AND STAFF REQUIREMENTS**

Any specific qualifications, certifications, experiences required?

* 1. *Qualification 1*
  2. *Qualification 2*
  3. *Qualification 3*
  4. *Add/Remove lines as needed*

1. **WHERE SERVICES ARE TO BE PERFORMED**

Is the vendor expected to be on site at IMSA or travel to other sites?

* 1. *State the work location(s)*

1. **IMSA obligations:**

What (if anything) IMSA will provide

* 1. *IMSA obligation 1*
  2. *IMSA obligation 2*
  3. *IMSA obligation 3*
  4. *Add/Remove lines as needed*

1. **TERM OF CONTRACT**

The initial term of the contract will be from *(MM/DD/YYYY or* the date of execution of the contract through *(MM/DD/YYYY).*

1. **RENEWAL**

State the initial contract period and renew option years and dates if applicable

* 1. *Initial Start Date End Date*
  2. *Renewal 1 Start Date End Date*
  3. *Renewal 2 Start Date End Date*
  4. *Renewal 3 Start Date End Date*
  5. *Add/Remove lines as needed*

1. **REFERENCES**

References - What kind of references are you expecting?

* 1. *Enter your reference requirements here*
  2. *Enter your reference requirements here*
  3. *Add/remove lines as needed*

1. **VENDOR RESPONSE FORMAT**

Normally, we ask the vendors to response to each line item in section 1 and 2 above. You are telling the vendor(s) what you wish to see in their response so that you can easily evaluate multiple proposals. If you need something different, this would be a place to detail it. Previous work examples, sample deliverables, spec sheets, maintenance lists, etc. might be noted.

* 1. *Enter your Response requirements here (if different than line by line as stated in section 1)*

**EVALUATION**

We need to detail how the bids coming in will be evaluated an scored. List the elements of Responsiveness that we will evaluate, their maximum weights in point format and minimum point requirements. You may enter here or attach a spreadsheet with items and weights.

Responsiveness Elements

|  |  |
| --- | --- |
| Responsiveness Elements | Maximum Responsiveness Weight |
| Administrative Compliance - We will determine whether your Offer complied with the Instructions for submitting Offers. Except for late submissions, we may require that a Vendor correct deficiencies as a condition of further evaluation. | 1 |
| Responsibility - We will determine whether you are a Responsible Vendor; a Vendor with whom we can or should do business. | 10 |
| *Evaluation Criteria 1* | *x* |
| *Evaluation Criteria 2* | *y* |
| *Evaluation Criteria 3* | *z* |
| *Add /Remove Evaluation Criteria as needed* |  |
| *Total Possible Responsiveness Points* | *nnn* |

Note: Pricing and its’ weight is automatically added to the Final evaluation

1. **PRICE**

**METHOD AND RATE OF COMPENSATION:**

You are asking the vendors to breakdown their estimates of costs. Based on what you are asking for, labor, overhead, materials, travel, duplication etc. may all be involved.

Identify the method of charging (hourly, daily, project, item, or other method) and provide the rate or price for each type of supply or service. Pricing shall be in accordance with the unit of measure specified and only one unit price shall be quoted per item unless specifically provided below. All extensions and totals requested shall be shown. Prices quoted must be net after deducting all trade or quantity discounts and any other available allowances.

* 1. *Price Spec 1*
  2. *Price Spec 2*
  3. *Add/Remove lines as needed*

1. **PAYMENT TERMS AND CONDITIONS**

How will the work be split for invoices and payments?

The default is "Payment will be made after completion of the Contract unless otherwise specified below." For large and long interval projects, a phased invoicing strategy based on completion of clear, measurable milestones and/or deliverables is often needed and stated in section 2. I.e.

We expect to receive three invoices as follows:

#1 Dollars for hours worked from start to approved design spec

#2 Dollars for hours worked from design approval to test complete

#3 Dollars for hours worked from test complete to production cutover

* 1. *Payment Terms 1*
  2. *Payment Terms 2*
  3. *Payment Terms 3*
  4. *Add/Remove lines as needed*

1. **Supplemental Provisions**

This is where you can specify attachments that will give the vendors background and context for your request. Good examples might be Information about the program or the Academic Calendar.

* 1. *Supplemental 1*
  2. *Supplemental 2*
  3. *Add/Remove lines as needed*

1. **Do you have any position on the use of Sub-contractor?**

Yes/No, any restrictions imposed by funders etc.

1. **Other Requests**

Any other requests of the process – i.e. Vendor meeting

* 1. *Request 1*
  2. *Add/Remove lines as needed*