

Instructions

Checklist

Submit the documents listed below with your [service request](#) for a new solicitation.

Use only Word or Excel formats.

- Solicitation Prep Form
- Draft Scope of Work / Specifications
- List of potential vendors to notify (*if available*)
- ITB / RFP-specific documents (*below*)

ITB / RFP-specific documents

If you're requesting an ITB, you'll need to develop a **pricing sheet** before the Specifications can be finalized.

If you're requesting an RFP, please submit your evaluation criteria, submittal questions, and any **attachments*** or **exhibits**** to include with your Scope of Work.

* **Attachments** refers to documents or forms bidders/proposers must submit.

** **Exhibits** refers to additional information for bidders/proposers.

Next steps...

After you've been assigned a procurement number, you'll need to complete these important action items:

1. Submit your SOAW

The Subcontracting/Apprenticeship Opportunities Worksheet (SOAW) is a mandatory review of all contracts to assess small business utilization.

Your SOAW service request should be submitted to the Business Development & Contract Compliance (BDCC) office.

2. Submit your IRF

The Insurance Requirements Form (IRF) is a review of insurance limits that's required for some procurements; contact a buyer if you're unsure.

Submit the IRF to Risk Management.

For a complete overview of the formal solicitation process, please consult our [Goods & Services Solicitation Guide](#).



Department of Executive Services
Finance & Business Operations Division
(206) 263-9400

Sept 2019

Goods & Services Solicitation Prep Form

1 General Contract Information

procurement title

\$
estimated total value

desired contract execution date

choose a solicitation type (*unsure? see our [Goods & Services Solicitation Guide](#)*)

number of proposal copies needed (*if applicable*)

2 Requesting Agency Information

implementing agency

division/section

project manager name

phone

email

P O E T A

3 Funding Source

yes **no** are funds appropriated?

King County FTA FEMA other grant

4 Current Supplier / Provider

yes **no** will this replace an expiring contract?

contract number

current supplier

do you have any concerns with your current contract or supplier you'd like addressed in this procurement?

continue on next page



What's sustainable purchasing?

"Sustainable" purchasing refers to taking into account environmental, social and fiscal considerations for the products and services you buy. Combined, our purchasing power can have a big impact.

Review the [Sustainable Purchasing Guide](#) for recommendations of how your contract can meet King County's policies.

Scope of Work style guidelines

- Use Arial font, size 12
- Identify **mandatory** requirements that must be met or the proposal/bid will be rejected
- Use "shall" for supplier responsibilities
- Use "will" for King County responsibilities
- Do **not** use "please," "we," or "I"

How long will it take to get a contract?

It depends on what type of contract you need. In general, we estimate:

- **Invitation to Bid (ITB):** 3 months
- **Request For Proposals (RFP):** 6 months
- **Co-Op Contract (Piggyback):** 1 month
- **Sole Source Waiver:** 1 month

Your procurement may take longer if contract terms & conditions need to be negotiated.

yes **no** I have reviewed the [Sustainable Purchasing Guide](#) to determine if there are any ecolabels, minimums or standards applicable to this contract, as required by the Sustainable Purchasing Ordinance ([KCC 18.20](#)) and Executive Policy ([CON-7-22-EP](#)).

the attached specifications include sustainable elements

yes **no** was an RFI used to develop the specifications?

RFI number _____

yes **no** will multiple contracts be awarded from the procurement?

yes **no** is this a term agreement (*not* a one-time buy)?

yes **no** will the scope of work, specifications, or terms & conditions require additional review? (example: Prosecuting Attorney's Office, steering committee, etc.)

yes **no** will you require a pre-bid/proposal conference?

yes **no** after this contract is awarded, will King County need to accept funds directly from the public? (example: parking meters)

yes **no** does the scope of work involve any architecture or design elements?

