

**SOLICITATION REVIEW MEMO  
FORM INSTRUCTIONS**

**OFFICE OF STATE PROCUREMENT  
DEPARTMENT OF TRANSFORMATION AND SHARED**

**Purpose of Document**

This information is provided to assist agencies in completing the Solicitation Review Memo form. This form is required prior to bid solicitation for the following procurements:

- Information Technology (including services, hardware and software) with a total projected cost greater than or equal to \$100,000.
- Procurements (including both services and commodities) with an initial contract amount of \$2,000,000 or more.
- Contracts under the authority of TSS– Building Authority Division.

The form is to be completed and attached to the requisition created in AASIS.

**Instructions**

Field Name	Instructions
Requisition #	The following information is required in this field: 1. Enter the Requisition number related to this procurement.
To	Select the appropriate office from the drop-down list depending on the type of solicitation. The options available are: <ul style="list-style-type: none"> <li>• Governor’s Office – This should be selected for proposed procurements with an initial contract amount of \$2,000,000 or more.</li> <li>• DFA IGS, Department of Information Systems (DIS) and Governor’s Office (GO) – This should be selected for proposed procurements of information technology services, hardware and/or software with a total projected cost greater than \$100,000 that require review by DFA IGS, Governor’s Office, and DIS.</li> <li>• DFA IGS - This should be selected for proposed procurements of information technology services, hardware and/or software with a total projected cost equal to \$100,000 that require review by DFA Intergovernmental Services.</li> </ul>
From	Enter the name of the procuring agency and the name of the agency contact.
Date	Enter the current date.
Date approval needed by Agency	The following information is required in this field: 1. Enter the date procuring agency needed approval for the project back.
Overview	Enter a level overview of the product/service to be procured. The overview should be a summary no longer than 2 sentences.
Length of Contract	This section requires two separate entries, one for the initial contract term and one for optional renewals. <ol style="list-style-type: none"> <li>1. Initial Contract Term – Enter the anticipated initial term of the contract (e.g. 1 year)</li> <li>2. Optional Renewals – Enter the anticipated number of optional renewals (e.g. 1 to 6 one-year renewals)</li> </ol>
Estimated cost for initial contract term	The following information is required in this field: 1. Enter the estimated cost for the initial contract term.

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Anticipated Total Projected Cost	<p>The following information is required in this field:</p> <ol style="list-style-type: none"> <li>1. Enter the anticipated total projected cost for the project. This amount includes all costs incurred during the initial term of the contract as well as all possible contract extensions or amendments.</li> <li>2. Provide a high-level breakdown of the anticipated cost for each year of the contract.</li> </ol>
Funding	<p>Enter the following information regarding the fund sources to be used for the procurement:</p> <ol style="list-style-type: none"> <li>1. Identify the fund source to be used for the procurement. Are the funds federal, state, both or from some other source. If other, please describe the funds.</li> <li>2. If more than one fund source is used, include the percentage of each type of fund. The total of all fund sources must equal 100%.</li> </ol>
Are fund balance sufficient to support the request:	<p>The following information is required in this field:</p> <p>Enter if the fund balance is sufficient to support the request.</p>
Detailed Project description	<p>Write a description of the planned purchase without technical jargon or acronyms. The easier the description is to understand, the less likely there will be a follow-up question for clarification or a delay in review.</p> <p><b>DO NOT SIMPLY COPY AND PASTE INFORMATION FROM THE BID DOCUMENT INTO THE MEMO.</b></p> <p>Include the following pertinent information that will provide the reader insight into the need for the purchase:</p> <ul style="list-style-type: none"> <li>• A general explanation of the product/service (you may attach information from the vendor or their website).</li> <li>• Who will use the commodities/services purchased?</li> <li>• How will the commodities/services be used?</li> <li>• Where will the purchased commodities/services be used?</li> <li>• When will the commodities/services be used?</li> <li>• Why are the commodities/services being purchased? <ul style="list-style-type: none"> <li>○ Is the commodity/service required by State or federal law?</li> </ul> </li> <li>• What would the agency do if the commodity/service was not provided by a third party?</li> <li>• Is this solicitation part of a larger project (i.e. Computer Software Development, Equipment or System Installation, Building Construction, etc.)?</li> </ul> <p>Is the solicitation a re-bid of a current commodity/service the agency already has in place?</p>
Agency Contract Information	<p>This section requires name, phone number and email address.</p> <ol style="list-style-type: none"> <li>1. Name – Enter the name of the agency individual responsible for answering any questions regarding the proposed procurement.</li> <li>2. Phone – Enter the phone number of the agency individual entered in the name field.</li> </ol> <p>Email – Enter the email address of the agency individual entered in the name field.</p>
Signature (Agency Director) & Date	<ol style="list-style-type: none"> <li>1. The Cabinet Secretary is required to review and sign the document on all proposed procurements with a total projected cost of \$1,000,000 or greater.</li> <li>2. For non-Cabinet agencies, the Director’s signature is required to review and sign the document on all proposed procurements with a total projected cost of \$1,000,000 or greater.</li> <li>3. Enter the date of the agency director’s signature.</li> </ol>