**Consulting Services ITQ**

**Solicitation Requirements and Evaluation Process**

**It is recommended that before procuring services from this Contract Agency should consult with their respective Purchasing Department**

Selecting an ITQ Qualified Contractor:

**Note:** Before soliciting any contractors for Actuarial, Accounting, Auditing and Financial Services, prior approval is required from the Office of the Budget (OB). Approval is obtained by completing the Consulting Services ITQ Review Form and emailing it, along with a Scope of Work document, to OB, ConsultingServices@state.pa.us. Agencies should anticipate five (5) business days for the OB review process. Because the Auditor General (AG) has the right of first refusal for any Auditing Category projects, OB will forward the Form to the AG for their review (no set timeframe for AG approval). Agencies must attach the approved form to any resulting Purchase Order.

1. **Projects estimated to cost less than $50,000**

Solicitation/Evaluation - An agency may select any qualified contractor from the applicable service commodity code and request a quote. No evaluation process is required.

**Note:**

* No renewals, extensions, or change orders which result in the Purchase Order exceeding $50,000, are allowed without prior DGS approval.
* Agencies may not issue more than one (1) Purchase Order in this cost range for work relating to a single project without prior DGS approval.
* Agencies may not issue more than two (2) Purchase Orders in this cost range to the same contractor, per service commodity code, in the same fiscal year without prior DGS approval.
1. **Projects estimated to cost over $50,000**

Solicitation – Agency must prepare a Request for Quotes by using the *RFQ/RFP Template located in the JAGGAER software tool*.

Upon the purchasing agency’s review/approval to proceed, solicit all qualified contractors in the applicable service commodity code or codes.

The purchasing agency shall invite the Bureau of Diversity, Inclusion and Small Business Opportunities (BDISBO) to participate in the Supplier Forum, kick-off meeting, development of the RFQ/RFP, the preproposal conference (if applicable), the drafting of the responses to offeror questions and in contract negotiations concerning small diverse and small business (SDB/SB) participation. The purchasing agency shall provide access to the technical, SDB/SB and quote proposals to BDISBO in the JAGGAER software tool.

After the Purchase Order is issued, the purchasing agency must complete the Award Form, BOP010, which includes the contractor’s SDB/SB commitments as identified in the Purchase Order and submit it to BDISBO within ten (10) days after the fully executed Purchase Order is sent to the contractor.

Evaluation - The agency must form an evaluation committee and follow the procedures for evaluating Competitive Sealed Proposals (i.e., Request for Proposals). The evaluation procedures for Competitive Sealed Proposals can be found in Part 1, Chapter 6, Section B of the DGS Procurement Handbook.

Agency must complete and retain the “Recommendation for Best Value Selection Memorandum” upon completion of the evaluation process. Document is to be attached and marked as “internal” to the Purchase Order.