

SOURCING EVENT - INTAKE FORM

INVITATION TO QUOTE - MOVABLE

Department	
Representative (name and email)	
Goods to be purchased (short description)	
Date Prepared (mm/dd/yyyy)	

Part I – Preliminary Questions

Select a response for each question below which will assist this office in developing the proper invitation to quotation.

- A.** Can the requested materials and supplies be provided under a City contract?
 YES NO
- B.** Has surplus materials and supplies been considered as an alternative to this purchase?
 YES NO
- C.** Is it a one-time purchase?
 YES NO
- D.** Will you need more in the foreseeable future?
 YES NO
- E.** Does this purchase involve Information Technology (software, hardware)?
 YES NO
- F.** If yes, did you obtain approval from City's ITI Department?
 YES NO

If "YES", please attach a copy of written approval.

- G.** Are you utilizing federal funds to finance this purchase?
 YES NO
- If "YES", please specify: FEMA HUD OTHER
- If "OTHER", please specify: _____

- H.** Have you purchased these types of materials and supplies before?
 YES NO
- If so, when? Please specify number of most recent PO: _____

- I.** Who was the vendor? Please specify name of firm or individual: _____
- J.** What is your desired delivery/start date to obtain the goods or services? _____
- K.** Are there any time constraints (e.g. deadline for funding, weather, use at a specific event, etc.)?

- L.** Did a supplier or vendor help developing the specifications? YES NO
- If "YES", please provide name of supplier or vendor: _____

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Part II – Specifications

Please detail the specifications of the invitation to quote on page 3 of this intake form. You can attach additional sheets, if necessary.

The specifications must be general in nature, and they must not specify “brand name only,” unless an equivalent is acceptable.

Any supplier/vendor who helped develop the specification should not be included in the solicitation, nor be awarded the purchase order or contract.

When preparing the specifications for materials and supplies, please consider the following questions:

- *How will the materials and supplies be used (include where they will be installed/operated, terrain, space/power constraints, etc.)?*
- *Are there any terms/acronyms that should be defined in the specifications?*
- *Are there any attachments (drawings, maps, etc.) that need to be included with the invitation to quote?*
- *Be sure to include: size/weight requirements/restrictions; requirements necessary to meet your business needs (make no assumptions); industry standards that must be met.*
- *Are there any compatibility issues to consider? If so, describe.*
- *Do you need anything else related (e.g. accessories)?*
- *Provide shipping/delivery information (consider who will be responsible for receiving, offloading/removing shipping materials; is advanced notice required?)*
- *Is installation required? If so, describe.*
- *What type of training and documents (e.g. owner’s manual) is required?*
- *What type of ongoing service/support/maintenance will be required?*
- *Are there any federal/state/local requirements or agency policies with which a vendor must comply?*
- *Are there any other requirements that a vendor must meet?*
- *What are your warranty requirements? Do you want a copy submitted with the bid?*

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Insert your specifications using following font:

Type: Arial

Style: Regular

Size: 10

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Part III – Supplier/Vendor

Propose names of suppliers and/or vendors to assist this office in ensuring that they are notified when the invitation to quote is posted.

<i>Name of firm or individual</i>	<i>Name of representative</i>	<i>Email address</i>	<i>Phone Number</i>	<i>SLDBE or LAUCP*</i>

**If applicable, specify if the firm or individual is qualified under the SLDBE program or the LAUCP program.*