

Use one of these forms for each telephone solicitation made and retain in TDHE's files. The number required will be determined by policy, but at least two responsive responsible contractors are required.

**OUTLINE OF  
REQUIRED ITEMS TO BE COVERED  
DURING TELEPHONE SOLICITATION FOR SERVICES  
OR OTHER REQUEST FOR PROPOSALS (RFPs)  
THAT ARE NOT JUST PRICE BASED  
(Small Purchase less than \$250,000)  
Fill out one copy of this form for each firm contacted.**

IDENTIFY SERVICES OR GOODS BEING SOUGHT: \_\_\_\_\_  
NAME OF TDHE PERSON MAKING CALL: \_\_\_\_\_  
NAME OF FIRM CONTACTED: \_\_\_\_\_  
FIRM'S TELEPHONE NUMBER AND FAX: \_\_\_\_\_  
DATE OF CALL: \_\_\_\_\_

**Each firm contacted should be provided the same information and asked the same questions.**

1. The TDHE is soliciting request for proposals for \_\_\_\_\_ under its small purchase procedures. This is a more informal and simplified process and will help us to expedite our selection. Because we are following this process, we will not be able to accept proposals that are more than \$250,000.
2. We are making this solicitation by telephone. We will be asking you a series of questions and based upon all the responses to these questions, the TDHE will make its decision. We will not be accepting written proposals, however if you would like to provide background information regarding education, experience and references, this information must be received by the TDHE by fax or delivery to the TDHE within two days.

Is the firm interested in responding to this request for proposals?

\_\_\_\_\_ (If yes, then continue with next question)

\_\_\_\_\_ (If no, then proceed no further)

Are you authorized to speak on behalf of the firm? \_\_\_\_\_  
If not, I will need to speak to someone who is authorized. [FILL IN: Name of authorized person responding to this request for proposals: \_\_\_\_\_]

[Note: If someone new gets on the phone, start back at paragraph 1 of this form.]

3. The scope of the work is as follows: [give description of the work, including project number, with sufficient specificity] \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
4. I need to read to you the list of rating criteria which we will use to evaluate all proposals.  
\_\_\_\_\_ up to \_\_\_\_\_ pts.

	up to	pts.
	up to	pts.
	up to	pts.
	up to	pts.
<u>Indian Preference for Indian Owned Firms</u>		15 pts.
<u>Evaluation of Indian Preference in Training, Employment and Contracting</u>	up to	10 pts.
	<b>Total</b>	<b>100 pts.</b>

5. *Indian preference will be given in making this award. Any firm seeking such preference must provide evidence that it is not less than 51% Indian owned and controlled. Those that satisfy this requirement will be given 15 extra points (15% of all the points available.) Do you seek this preference? \_\_\_\_\_ . If so, we will send or fax to you today a prequalification statement that you must fill out and return within two days of your receipt. We will then review it and determine if you are eligible for preference. If one has been submitted to us in the last 6 months, then fax or mail to us today a written statement identifying changes in your organization and we will determine if you are eligible for preference.*

**IF A PREFERENCE PREQUALIFICATION STATEMENT IS NEEDED, RECORD DATE AND FAX NUMBER WHERE FAXED: \_\_\_\_\_ OR, DATE AND ADDRESS WHERE MAILED: \_\_\_\_\_**

**[INDIAN PREFERENCE:  granted, add 15 points to total  not granted]**

6. *All proposals must contain a commitment to provide preference in 1) subcontracting, 2) training, and 3) employment. What methods will you use to provide such preferences?*

- 1) subcontracting: \_\_\_\_\_  
 \_\_\_\_\_  
 2) employment: \_\_\_\_\_  
 \_\_\_\_\_  
 3) training: \_\_\_\_\_  
 \_\_\_\_\_

**[EMPLOYMENT/TRAINING/CONTRACTING PREFERENCE: \_\_\_\_\_ points awarded (out of 10), then add to total]**

*Only read if no method is given: If you believe it is infeasible to provide Indian preference in subcontracting, you must certify to us now the reasons why. This explanation must also be provided in writing to the TDHE within 3 days, but an award may be made prior to receipt of this certification.*

7. *In order for us to make a decision, we also need to ask you the following questions:*

a) \_\_\_\_\_?

Notes on response given: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

b) \_\_\_\_\_?

Notes on response given: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

c) \_\_\_\_\_?

Notes on response given: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

d) \_\_\_\_\_?

Notes on response given: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

e) \_\_\_\_\_?

Notes on response given: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

f) \_\_\_\_\_?

Notes on response given: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

8. *All proposals must commit to remaining open for thirty (30) days. Please confirm that you agree.*

\_\_\_\_\_

9. *If awarded, you agree that you shall execute a TDHE provided contract, within the time later designated by the TDHE, and to be bound by all terms and conditions set forth therein, including but not limited to assurance of performance, completion dates, prevailing wage rates, warranties, other federal requirements, and other terms and provisions as set forth therein.*

10. *The TDHE reserves the right to reject any and all proposals.*

11. *And lastly, the TDHE is required to advise you that it has no list of local subcontractors.*

12. *We will let you know our decision on the award.*

13. *Thank you.*