Solicitation Getting Started Toolkit: Template Intake Form

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An intake form can be useful as an organized method for collecting initial information about an upcoming solicitation (i.e., a Request for Proposals or Invitation to Bid) from a customer agency or department. This template provides two examples of how procurement intake forms can be structured and a bank of questions to consider incorporating in an intake form. We encourage you to use these materials as a basis for developing your government’s intake form, whether that form is designed in an e-procurement system or collected via a Word document or Google or Microsoft survey tool.

Keep in mind that the creation of any new form can feel burdensome for your customer departments or agencies. Carefully adapt the form to make sure that every piece of information will provide distinct value and will not be overly taxing for the individual filling it out. Where possible, we encourage you integrate the way you collect this information into existing processes and systems. Finally, you may want to include links in your intake form to additional procurement resources, procedures, FAQs, or process overviews to support staff new to working with your purchasing office (and to minimize the number of questions you receive!)

Throughout the examples below, yellow highlighted text calls out areas where information specific to your government should be added.

## EXAMPLE 1: Solicitation Entry Sheet

**Gathering Information for New Products or Services**

**Instructions**: When ready for support from [name of purchasing office] on a solicitation, fill out this form to identify the new product/service needed, why it's needed, and how it intersects with our government’s key strategic goals. This form helps [name of purchasing office] staff have all necessary information about your request collected in one place and to reduce back and forth via phone and email.

Include instructions for how staff should submit this sheet, contact information needed for questions, and information about what will happen after the form is received.

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| BASIC INFORMATION | |
| **Date:** | |
| **Description of Product/Service Needed:** | |
| **Department:** | |
| **Point of Contact:**  Use this space to list the primary points of contact at the department or agency for this solicitation. Whom can Purchasing reach out to when they have a question? Please include their name, title, email address and phone.  **Contact 1:**  **Name**  **Title:**  **Department:**  **Email:**  **Phone:**  **Contact 2:**  **Name**  **Title:**  **Department:**  **Email:**  **Phone:** | |
| **Is this a one-time purchase, or do you anticipate needing this product/service on an ongoing basis?** | One-time  Ongoing |
| **Is this replacing an existing contract or purchase order?** | Yes  No |
| **If ‘Yes’ to above, what is the specific contract number (or purchase order number)? When does the current contract expire?**  If possible, insert brief instructions for how staff can review existing contracts and renewal/expiration dates here. | Contract Number (if applicable):  Contract Expiration Date (if applicable): |
| **What is the estimated annual cost for this purchase?** |  |
| **Will this be purchased using federal or grant funding?** | Yes  No  If yes, what grant or federal funding source? What requirements are attached to this source? |

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| PURPOSE, SPECIFICATIONS, & OUTCOMES | |
| **Topic** | **Department Response** |
| **Purpose:** In a few sentences, what does the product or service need to accomplish? What current or anticipated problem does it intend to address? | EXAMPLE: We need a janitorial service to clean the restrooms and restock the supplies at 3 city parks (South Park, West Park, and North Park) daily. This service needs to result in thoroughly cleaned restrooms each day. Without properly cleaned restrooms, residents’ health could be put at risk, or we could face frustration from families using parks and expecting to find a clean restroom. |
| **Specifications and Scope of Work**: Describe the necessary characteristics (technical or qualitative) of this product or service for it to fulfill its purpose. You can list categories here – the assigned buyer will work with you to clarify exact numbers and measurements. Feel free to include attachments with additional information. | If a PRODUCT, please define all specifications the product must meet. Include any services that the firm must provide to fulfill your needs (e.g., delivery, installation, removal).  If a SERVICE, please define the scope of work (all work the vendor will perform) and all requirements the service must meet. |
| **Evaluation**: In a couple of sentences, how do you plan on determining which bidder or proposer best meets your needs? What factors will you be looking at? | EXAMPLE: We plan to evaluate the fire hydrant parts by price, but vendors will need to meet the following 5 minimum requirements to be considered. |
| **Outcomes**: In a couple of sentences, what does success look like? What is your ideal outcome from this project? | EXAMPLE: We have customizable, long-lasting vinyl stickers that we can place on city vehicles for identification purposes. Success is an affordable, durable sticker that will not need to be replaced before 5 years. |

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| VENDOR OUTREACH | | |
| Based on your research, what prospective vendors – especially local, small, or diverse businesses – should be made aware of this opportunity? Please list them here. | | |
| **Vendor Name** | **Contact Email** | **Contact Phone** |
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## EXAMPLE 2: Solicitation Entry Sheet

**Gathering Information for New Products or Services**

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| **Thank you for submitting this Solicitation Entry Sheet.** This form helps [name of purchasing office] staff have all necessary information about your request collected in one place and to reduce back and forth via phone and email. **Please note the following:**  Include instructions for how staff should submit this sheet, contact information for questions, and information about what will happen after the form is received. If approvals are a required step before a department or agency contact submits the form, encourage them to seek those approvals.   * All form fields are required. Complete the entire form and add as much detail as possible. * If you have questions while filling out this form, contact relevant purchasing department contact info. | |
| Section 1: Requestor Information | Section 2: Additional Contact Information |
| * Date of Form Submission: * Requestor Name: * Title/Position: * Department, Division: * Phone Number: * Email: | * Name: * Title/Position: * Department, Division: * Phone Number: * Email: |
| Section 3: General Information | |
| * Title of Solicitation (e.g., RFP or ITB): * Scope of Work (Describe in one paragraph what the vendor will need to do): * Outcome (What outcome for residents or government staff do you want to see achieved from this purchase?): * Is this a one-time purchase, or an ongoing need the government has? * What is the desired start date of the contract? * What are the specific consequences if we are delayed beyond the desired start date? * Previous solicitation number. (If this has never been solicited, enter N/A.) * Please share any additional information, details, or special circumstances about this purchase. | |

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| Section 4: Funding Information |
| * Has funding for this purchase been confirmed with the [name of Budget and Finance Department] and/or verified in [name of ERP/financial software]? * Fund #: * Department: * Account(s): * Annual budget amount available for this purchase: * Is this contract funded through federal monies?   + If YES, what is the specific funding source and are there any requirements attached that Purchasing should be aware of? * Is this contract funded through grant monies?   + If YES, what is the specific funding source and are there any requirements attached that Purchasing should be aware of? |
| Section 5: Additional Information |
| * The following two bullets are examples of possible information that could be required and should be customized to your government’s specific needs * Is this purchase for vehicles or motorized equipment?   + **NOTE:** If YES, have you made or been working with our fleet specialists on this procurement? * Is this purchase for technology?   + **NOTE**: If YES, have you made IT aware of this upcoming solicitation and your technology needs? |
| Section 6: Attachments |
| * List any required attachments you would like to collect here. |

Additional questions you may wish to include in your intake form:

* What is the beneficial impact of this purchase?
* What problem or challenge does this purchase address?
* How does this purchase align with our government’s goals and priorities?
* If you have issued a solicitation for this product or service in the past, what can we change about the procurement to get better results? What went well and didn’t go well?
* Do you anticipate any challenges with this purchase? If so, what are they?
* Are other departments or agencies impacted by your purchase? If so, have you communicated with them about this solicitation?
* Are other departments or agencies also soon to purchase similar products or services? Do you believe there is an opportunity to collaborate?
* Do you have any concerns about past or future vendor performance related to the product or service you are procuring?
* Do you have any ideas for innovative approaches to this procurement?
* What market research have you conducted so far? What have you learned from it?

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| The [Procurement Excellence Network](https://www.procurementexcellencenetwork.org/) (PEN) is a free, online community for public sector leaders seeking to transform their jurisdiction’s procurement practices. It offers virtual trainings, tools, templates, and coaching, while building peer connections for leaders as they launch efforts to make procurement more strategic, fair, and innovative. PEN is an initiative of [Partners for Public Good](https://partnersforpublicgood.org/) (PPG), a 501(c)(3) non-profit organization that helps state and local governments use key operational levers—procurement, workforce, digital infrastructure, and budgeting—to drive public impact.  Partners for Public Good is grateful for support from Bloomberg Philanthropies.  © Copyright 2025 Partners for Public Good |