SECTION 14: PROCEDURES FOR P/T SERVICES CONTRACTS VALUED BETWEEN $5,001 AND $25,000

This section outlines procedures for contracts between $5,001 and $25,000. As with those for $5,000 or less, the final contract must be approved by the Commissioner of Administration.

**Equity Select**

Equity Select is a procurement method that allows you to award directly to a TG/ED/VO business a contract up to $25,000, including all extension options, for goods, services, professional/technical services, and construction. With Equity Select, you may forgo a competitive solicitation process. Please use and attach the Quick Call & Equity Select Cover Sheet for contracts entered into under this method. If you choose to use a competitive process instead, you are encouraged to invite multiple TG/ED/VO businesses to respond.

**Quick Call for Proposals**

Professional Services valued in excess of $5,000 must be procured via a competitive process unless a statutory exemption exists. In 2014, the legislature adopted a streamlined approach that enables a simplified and streamlined process for the acquisition of professional services under $25,000. Admin’s Materials Management Division has termed this process a “Quick Call for Proposals” or a “Quick Call” process.

A Quick Call is a simple solicitation document that is prepared by the agency and sent out to a minimum of three vendors, with one required to be a certified Targeted Group/Economically Disadvantaged or Veteran-Owned business, if available. The document is simple and short and structured so that vendors will be able to respond succinctly and with relative ease. The Quick Call template is structured similar to a typical application that is easy for agencies to put together and user friendly for the responding vendors to use in submitting information to agencies about the services they are proposing to provide.

Based on the information contained within the agency’s Quick Call, vendors will submit proposals to the soliciting agency. The agency will review, evaluate (score) the proposals received and document the results. Contract negotiations will commence with the highest scoring vendor. If the agency is not able to successfully negotiate a contract with the highest scoring vendor, the agency may move on to the next highest scoring vendor, and so on. Once a contract is fully negotiated and written, the agency will encumber funds and send the contract to the vendor for signature. Once returned, the agency will sign the contract and submit it to Admin’s Materials Management Division for approval and final execution. Agencies must also submit a Quick Call Contract Cover Sheet along with the contract.
Process Steps: Equity Select

1. Agency determines a need for P/T Services that are anticipated to cost under $25,000. When making the cost estimate, be sure to include any potential amendments and extensions. The value of the entire contract is the amount that should be considered when determining if an Equity Select or Quick Call is the appropriate procurement method.

2. Agency reviews the requirements stated in Minn. Stat. 16C.08, Subd. 2 (1)-(10) and makes sure all of those provisions are adhered to. This includes making sure that no state agency employees are able and available to perform the work before pursuing a contract with a vendor.

3. Once the contractor is selected, agency begins negotiations. MMD can assist you with this process if you desire help. Contact Justin Kaufman at Justin.kaufman@state.mn.us or (651) 201-2456 or Perry Egertson at Perry.Egertson@state.mn.us or (651) 201-3116 for negotiations assistance.

4. Agency prepares contract, encumbers funds and routes to the vendor for signature.

5. Agency signs contract and completes the Quick Call Contract Cover Sheet. Send this Cover Sheet along with 3 copies of the P/T Contract to MMD for review and final execution of the contract.

Process Steps: Quick Call

1. Agency determines a need for P/T Services that are anticipated to cost under $25,000. When making the cost estimate, be sure to include any potential amendments and extensions. The value of the entire contract is the amount that should be considered when determining if an Equity Select or Quick Call is the appropriate procurement method.

2. Agency reviews the requirements stated in Minn. Stat. 16C.08, Subd. 2 (1)-(10) and makes sure all of those provisions are adhered to. This includes making sure that no state agency employees are able and available to perform the work before pursuing a contract with a vendor.

3. Agency prepares the Quick Call. Make sure to read, but then remove all agency instructions that are listed in brackets. Make sure to obtain all required internal agency approvals before distributing the Quick Call.

4. Agency sends the Quick Call to vendors. It is the agency’s option to either directly solicit a minimum of 3 vendors (at least one of which must be a Targeted Group/Economically Disadvantaged or Veteran-Owned business if available) or publish a notice of the Quick Call on the MMD website. If 3 vendors are not able to be identified, the agency P/T Coordinator may grant an exception which is required to be documented in writing.
5. Agency prepares for evaluation of expected proposals by establishing a team of evaluators. Be sure to have each reviewer complete an Evaluation Team Member Agreement. Create evaluation sheets.

6. Agency receives proposals. Document the time each proposal was received. Reject proposals if late or if they materially deviate from the minimum qualifications required in the Quick Call. It is recommended that you confer with MMD prior to rejecting a proposal.

7. Agency conducts evaluations of proposals. Not all evaluation processes are the same. Some involve interviews or demonstrations, others do not. Some evaluations entail the shortlisting and interviewing of the top-tiered responders. Make sure you are detailing your intended process in the Quick Call document and following that procedure. If you want to discuss process options, contact MMD.

8. Once the successful responder is identified, agency begins negotiations. MMD can assist you with this process if you desire help. Contact Justin Kaufman at Justin.Kaufman@state.mn.us or (651) 201-2456 or Perry Egertson at Perry.Egertson@state.mn.us or (651) 201-3116 for negotiations assistance.

9. Agency prepares contract, encumbers funds and routes to the vendor for signature.

10. Agency signs contract and completes the Quick Call Contract Cover Sheet. Send this Cover Sheet along with 3 copies of the P/T Contract to MMD for review and final execution of the contract.

Contracting Checklist

The following checklist will assist you with complying with all statutory and policy required steps when you are preparing a professional/technical service contract. The total contract value means the entire cost of the work from beginning to end, including any anticipated amendments.

The Contract Checklist $5,001 - $25,000 is available on the MMD website at:

PDF - Contracting Checklist $5-25k

WORD - Contracting Checklist $5-25k