Finance & Operations Procurement and Business Services Policy FO-PUR-11
Requests for Proposals

A Request for Proposal (RFP) is a written request for sealed proposals. The RFP procedure provides the option for a negotiation phase and best and final offer.

Due to the complexity of the RFP procedure, all RFP’s, regardless of the dollar amount, will be processed through the Procurement and Business Services Department. A requisition is required before an RFP can be processed, complete with account number, estimated dollar amount and required signatures. Please allow a minimum of two weeks for the Procurement and Business Services Office to prepare an RFP for solicitation, as all incoming requests are handled on a first in/first out basis.

The RFP normally consists of the sections described below:

- RFP Cover
- Terms and Conditions
- Execution of Offer
- Administrative Information Sheet
- Special HUB forms (HUB Subcontracting Plan)
- Scope of Proposal
- Introduction Statement of Work/Technical Specifications
- Vendor Qualifications
- Contract Term and/or Options to Extend
- Proposal Content
- Evaluation Criteria for Award
- Contractual Requirements
- Exhibits, if applicable
- Attachments

RFP EVALUATION PROCESS
The department’s team leader, with the assistance from the assigned purchaser, is responsible for determining the manner in which the evaluation of the proposal should be conducted and the method for selecting the most responsible proposer, taking into consideration prices and other best value evaluation criteria listed in the proposal. The purchaser will review the Team Leader’s responsibilities. In reaching a determination, the purchaser will identify the significant points in the RFP to evaluate and assign relative weights to each.

An evaluation scoring matrix is developed for use by the evaluation team members. The matrix becomes the scoring worksheet to be completed by each evaluation team member. The purchaser normally serves as chairperson.

When the evaluation is selected, it is recommended that a minimum of three with a maximum of five be selected. The panel should be culturally diverse with expertise and knowledge of the product or service being procured. The individual who is responsible for the project should be the primary contact or team leader.

THE PROPOSAL OPENING
The proposal will only be considered if it is received before the date/time and place scheduled for receipt. Procurement and Business Services will read only the names of the companies who have submitted a response to the RFP, if requested by an interested party. The assigned purchaser will review all proposals to ensure each proposal meets the requirement stated in the RFP before it is sent to the review
committee. If a HUB Subcontracting Plan is required as part of the RFP package, the HUB Coordinator will review it in the opening process for compliance per the HUB Subcontracting requirements.

**EVALUATION OF THE PROPOSAL**
The purchaser conducts an evaluation team meeting to brief the team on the evaluation, and obtain non-disclosure statements (to be provided by the purchaser). Each member is a voting member (the purchaser is not a voting member). Conclusions must be reached independently of one another and members must be impartial in evaluating proposals.

**EVALUATION ACTION**
The team leader sets the tone through the evaluation team briefing. The team leader is responsible for:

- Tabulating Scores;
- Calculating values; and
- Doing one (1) of the following:
  1. Recommending an award;
  2. Recommending meetings to purchaser with vendors for clarifications on the RFP;
  3. Discontinuing the process.

*Note:* Make it known to the team that their individual scores may be classified as a matter of public records and subject to the Open Records Act. Anytime after award, the individual scores may be brought out as a matter of record.

**COMMITTEE’S REVIEW**
The committee will review all qualified RFP’s. If the committee needs clarification on certain issues stated in the RFP, the committee (through the purchaser) will schedule a meeting with the vendor(s). When all issues are resolved by the committee the evaluation process will begin. Once the evaluation is completed, a recommendation is made based on the evaluation scores. The recommendation may be one of the following:

- Award to the vendor with the total highest score of all voting members;
- Reject all proposals; or
- Request a best and final offer from the vendor(s) with the highest score(s).

If the committee notes there is more than one vendor (based on the evaluation scores), that could be considered as a finalist, the committee may request more than one best and final offer from the finalist(s). For there to be two (2) finalists, their total scores must be between one (1) and two (2) percent. The committee will then review the original evaluation worksheets a second time taking into consideration the best and final offer(s) of the finalist(s) and adjust accordingly. The proposer with the total highest evaluation score of all voting members may be recommended for the award of the contract. The University reserves the right to modify the RFP selection process by outlining the selection process in the RFP.

Reviewed by: John C. Hitzeman - Director of Procurement and Business Services - 03/28/11
Next Review: 03/28/12