

Sam Houston State University
A Member of The Texas State University System

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

All solicitations, regardless of type or dollar amount, are advertised through BearKatBuy Sourcing Director. A Request for Proposal (RFP) is an electronic request for sealed proposals in BearKatBuy Sourcing Director. The RFP procedure provides the option for a negotiation phase and best and final offer.

Due to the complexity of the RFP procedure, all RFPs, regardless of the dollar amount, will be processed through the Procurement and Business Services Department. An approved requisition in BearKatBuy is required before an RFP can be processed. 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.

All RFPs are processed in BearKatBuy Sourcing Director and 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.

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 submitted in BearKatBuy Sourcing Director before the date/time stated in the solicitation. While all proposals are submitted electronically in BearKatBuy Sourcing Director, Procurement and Business Services will, if requested by an interested party in attendance at the date/time, read only the names of the companies who have submitted a response to

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the RFP. The assigned purchaser will review all proposals to ensure each proposal meets the requirement stated in the RFP. If a HUB Subcontracting Plan is required as part of the RFP package, the HUB Coordinator will review it for compliance per the HUB Subcontracting requirements.

EVALUATION OF THE PROPOSAL

The purchaser conducts an evaluation team meeting to ensure team members are trained and able to use the electronic evaluation process, 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. Once evaluations are complete in BearKatBuy the team leader is responsible for:

- 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. Any time after award, the individual scores may be brought out as a matter of record.

COMMITTEE'S REVIEW

The committee will review all qualified RFPs. If the committee needs clarification on certain issues stated in the RFP, the committee (through the purchaser) will submit questions to or 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).

Multiple awards are possible if stated in the RFP. 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: Tessy Rappé, AVP Finance & Operations
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Next Review Date: April 2020