

## REQUEST FOR PROPOSAL (RFP) GUIDANCE AND TEMPLATE

Procurement by competitive negotiation is used when a) the procurement value is expected to be \$150,000 or more; b) are a complex and technical nature and cannot be fully described in bid specifications; and c) the award of the contract will be based on factors other than price alone.

1. Prepare the bid packages. The draft template below may assist in the preparation of the bid specifications. Bid packages may be picked up or mailed and the institution must keep a list of the name and date that each vendor is given a bid package. **Proposals must be solicited from an adequate number of qualified sources.** Include in the bid package:

- Bidder Acknowledgement Page
- Anticipated contract period
- Goods/services needed
- Delivery and Price Schedule
- Certificate of Independent Price Determination
- Conflict of Interest Questionnaire

2. Publicize the Procurement

**The Request for Proposal (RFP) must be publicly announced** at least once and at least fourteen (14) calendar days prior to the date of the bid opening. The RFP must be publicly advertised in a newspaper of general circulation and must include the time and place of the bid opening. A copy of the advertisement from the publication must be kept on file for documentation. The State agency must be notified at least 14 days prior to the opening of the bids the time and place where it will occur.

Below is a sample newspaper advertisement.

### SAMPLE ADVERTISEMENT FOR BIDS

Bids will be accepted for \_\_\_\_\_ services/goods for the \_\_\_\_\_, a child care center located in \_\_\_\_\_, Colorado, to provide \_\_\_\_\_.

Bid packets and specifications may be obtained at the center located at \_\_\_\_\_ and/ or calling \_\_\_\_\_. Bids will be opened at the above address on \_\_\_\_\_ at \_\_\_\_\_.

3. Bid Opening Procedures and Bid Log

The institution must publicly open all bids on the date and time advertised. Returned bid packages from vendors must be dated with the date received (written or stamped). No bids shall be accepted for consideration after this date and time.

The institution is not allowed to change any part of a vendor's bid package once the vendor has submitted it to the institution. Bids must not be altered in any way after the bid opening.

4. Evaluation of Proposals

**The institution must have a written method for conducting technical evaluations of the proposals received and for selecting the vendor.** Selection of a vendor can only be based on the evaluation factors

stated in the RFP and any vendor whose proposal does not meet the mandatory requirements must be eliminated. The institution may request any additional information or clarification needed from the vendors.

#### SAMPLE EVALUATION METHOD

Criteria	Points	Final Score
Technical Content	50	
Experience	35	
Proposed Cost	15	
Total Points	100	

#### 5. Award

Upon completion of the evaluation and vendor selection, an award may be made to the responsible offeror whose proposal will be most advantageous to the institution, price and other factors considered.

The original RFP and supporting documentation (all bids submitted, bid log, determination documentation, correspondence, faxes, etc.) must be kept on file for three years plus the current year.

## REQUEST FOR PROPOSAL (RFP) TEMPLATE

I. Background, Overview and Goals
<i>Present a general explanation of the purpose of the RFP and the specific goals or results to be accomplished by the project.</i>
II. Project Budget
<i>Define the budget range for the project, as well as the budget for each phase of the project, if applicable.</i>
III. Scope of Work
<i>Describe the material, product, or service sought (the work to be done) as thoroughly as possible of what the expectations are. Such description shall not contain features which unduly restrict competition. The description may include a statement of the qualitative nature of the material, product or service to be procured, and when necessary, shall set forth those minimum essential characteristics and standards to which it must conform if it is to satisfy its intended use. Detailed product specifications should be avoided if at all possible. When it is impractical or uneconomical to make a clear and accurate description of the technical requirements, a "brand name or equal" description may be used as a means to define the performance or other salient requirements of a procurement. The specific features of the named brand which must be met by offerors shall be clearly stated.</i>
<i>Provide the offeror enough information and direction to prepare a satisfactory proposal with sufficient detail. Define the work to be completed, list all specific deliverables, the schedule of activities including the completion date of the project with options to renew up to # of years, the personnel to be utilized, and a description of all elements of the project. (Who is responsible, What is required, When it is required, How it is to be done, Where it is to be accepted, and Why we are doing this.)</i>
<i>Clearly set forth all requirements which offerors must fulfill and identify all evaluation factors and their relative importance.</i>
IV. Offeror Response Format
<i>Provide detailed instructions to the offerors on the specific format to be used in preparing and submitting their proposals. Provide a detailed explanation of how the offeror is to respond to the RFP, identifying such items as: number of proposal copies and/or cd(s) required, page limits, and font size / print requirements (one-sided / two-sided). Identify any templates or forms to be used (budget templates, schedule forms). A specific outline or format can also be required for offerors, if desired. Define for offerors that their proposal should include <u>at least</u> the following:</i>
<ol style="list-style-type: none"><li><i>1) Offeror's approach to the described project – how they plan to accomplish the work.</i></li><li><i>2) Proposed method(s) of providing the work – approach to tasks, proposed solution.</i></li><li><i>3) Offeror's company experience and capability – company experience relating to work needed (may request references).</i></li><li><i>4) Offeror's personnel to be assigned to the project (may request resumes).</i></li><li><i>5) Experience of assigned personnel – minimum qualifications of personnel to be involved in the work, the level of such involvement, and information on all anticipated subcontractors.</i></li><li><i>6) Budget – firm total cost budget proposed, including a cost estimate for all project elements within the total cost proposed, as well as how costs were determined. Should include cost estimate for all project elements by task, staff person assigned, and any expenses.</i></li><li><i>7) Project Deliverables / Milestones Timetable.</i></li></ol>
V. Evaluation

*Clearly state the evaluation factors that will be used to evaluate the information submitted in the Offeror Response Format section above. Do not include the points for the evaluation factors, but list the evaluation factors in order of importance. This may be: technical content of the proposal or methods proposed to complete the project; qualification and experience of the personnel assigned to the project; previous experience and performance on projects of similar scope and size; and the budget/total proposed cost. The cost provided must be a total cost and not an estimate, and constitute the offeror's best and final offer.*

**VI. Other Requirements**

*Include any other requirements not defined above, such as recordkeeping, non-performance or cancellation rights, renewal options or insurance requirements.*

**Timeline and Contact Information**

*Include the due Date and time for the proposals, the address where proposals can be dropped off or mailed, and contact information for any questions.*