

Agency Lead and Contracts and Procurement Instructions & Responsibilities for RFPs

Request for Proposals "RFP" for consulting or professional services over \$50,000

1. Agency Lead initiates the development of the RFP

- Perform research and complete the RFP Development Worksheet.
- Liaison for their Agency through completion of a fully executed contract.
- Carefully review the Committee Member's Handbook.
- Consult Attorney to ensure a lawful contract will result.

2. Agency Lead recommends Members for a Selection Committee

- The Selection Committee includes approximately 5 or 7 members. There should be 2-3 from the Agency and 2-3 should be from the community or another county agency.
- Include unbiased, knowledgeable members, subject matter experts and end-users.
- Confirm that Committee Members are willing to serve on the Selection Committee.
- Procurement will facilitate the process and is not a scoring member of the Selection Committee.

3. Agency enter requisition into PeopleSoft

- Coordinate with Agency Fiscal Manager to enter the requisition into PeopleSoft.
- Requisition information shall include:
 - ✓ Procurement Name: RFP (Title)
 - ✓ Supplier: "Bid"
 - ✓ Estimated project \$ or first year budget \$ amount
- Attach RFP Development Worksheet.

4. Procurement and Agency Lead will cover the pre-proposal meeting

- Procurement will schedule and facilitate the meeting
- Agency lead will discuss the vision of the project in the meeting

5. Agency Lead and Contracts & Procurement will distribute and review proposals

- Procurement will facilitate a pre-score meeting to distribute the scoring packets. Evaluation methodology will be discussed with Committee Members to ensure that everyone understands the meaning of each criterion before they begin scoring.
- If a pre-score meeting isn't held, distribute scoring packets to Committee Members giving them ample time to read and score the proposals.
- Procurement will discuss and deal with any potential conflicts of interest among Committee Members.
- Each Committee Member must individually score the proposals following the guidelines in the handbook.
- Agency Lead will read each proposal completely and inform Procurement of any deficiencies or concerns.

6. Works with Procurement to evaluate costs:

- Since cost is an objective rather than subjective issue, the Selection Committee is not involved in the cost evaluation. Procurement will calculate the cost score.

7. Procurement will coordinate and facilitate committee meetings:

- Ensure that each Committee Member reads, understands and signs a "Conflict of Interest and Disclosure Certification". Signed statements from Committee Members will be retained by Contacts and Procurement.
- Coordinate Committee review and discussion of individual scores to resolve wide scoring variances.
- Procurement may seek clarifications from the Proposers if needed.
- Collect score sheets from each Committee Member and fill-in the master scoring workbook.
- If interviews are needed and/or required, the scores will be used to define top ranked Proposers and scheduling the oral presentations and/or demonstrations.
- Collect proposal copies for Committee Members of firms not receiving an interview.

8. Before Interviews, Agency Lead will:

- With input from the Selection Committee, compile list of reference questions.
- Conduct the reference checking to fairly ask the same questions for each Proposer.
- With input from the Selection Committee, compile interview questions. Determine if questions will be sent ahead to those being interviewed.

9. Procurement will schedule and coordinate oral presentation and/or demonstrations: To properly evaluate proposals, oral presentation and/or demonstrations may be scheduled to answer questions by Committee Members or for a demonstration of the proposed product or service. Only those Proposers that are potentially acceptable are invited to participate in oral presentations and/or demonstration.

- Contact Proposers being interviewed with date and time.
- E-mail questions to the Proposers being interviewed.
- When all Proposers have confirmed they will attend the interview, send an e-mail to let the Committee Members know the times.

10. Guidelines and parameters for coordination of oral interview and/or demonstrations.

- Procurement will serve as facilitator.
- Each Proposer is allotted the same amount of time.
- Procurement manages the allotted time and stops Proposers and/or Committee Members when they are out of time.
- The purpose of the interview is to allow Proposer to clarify statements in their proposal.
- The original proposal cannot be changed in any aspect at the interview or demonstration.
- If during the interview it becomes evident that Proposers may need to amend their proposals, a Best and Final Offer process may be initiated by the Procurement.
- After ALL the interviews/demonstrations, Committee Members will complete their score sheets.
- Procurement will add to master scoring matrix to determine top ranked Proposer.
- Personal notes have met their retention at this time and should be shredded.

11. Best and Final Offer (BAFO): The Best and Final Offer process is to encourage potential Proposers to offer their best proposal by amending their original proposal, if needed.

- Procurement will prepare, issue, and accept BAFO responses.

12. Contracts and Procurement will compile all evaluation-related documentation.

- Collect all Committee Members proposal copies.
- Prepare the award notification.
- Respond to record requests.
- Ask Selection Committee and Agency Lead for “lessons learned”.

13. Procurement and Agency Lead will coordinate the preparation of a contract

- Procurement will send a request to the Agency Attorney to prepare the agreement.
- Buyer requests the required insurance certificate(s) from the awarded vendor.
- Agency and Procurement will negotiate a contract with the Proposer.
- Agency lead will obtain Division Directors and Proposers signature on contract.
- Procurement will take the lead to input into PeopleSoft and obtain the County’s authorized signature.