



PURCHASES OVER \$50,000 REQUEST FORM

INTRODUCTION / SUBMITTAL INSTRUCTIONS

The Request for Proposal (RFP) solicitation Method is used when best value criteria, in addition to price and delivery, are considered in determining award. The RFP process generally takes 1-3 months to complete and requires active participation of the department requesting the purchase depending on the complexity of the project. They are responsible for preparing a scope of work and a list of suppliers that should receive the RFP as well as required delivery dates along with other information as needed to make a possible. RFP's are sealed bids that once opened a score sheet will be prepared by the business office for an evaluation team to review.

Submittal Instructions

The department asking for the project must review and complete this form in its entirety. **Completed forms and additional information requested below must be sent to the Business Office by email at purchasing@grayson.edu.** Incomplete forms or forms sent to the incorrect location will be returned to the department.

Once the form is received the process will begin for an RFP. It is required by Texas Government Code 271.025 and is required to run in the local newspaper – one time per week for 2 weeks, RFP issue date, RFP bid opening date. Depending on the project the approval may need Board of Trustee approval. The evaluation team may need to meet to discuss the project/scores before a determination can be made. Grayson College currently has bidding opportunities online at graysoncollege.ionwave.net. Vendors will need to be registered on the site in order to bid.

Business Office Administration will review and address immediate questions with the department. The purchasing department will organize and format all information provided into the RFP template and will work with the team to finalize the draft, schedule required team meetings, collect signed Non-Disclosure Agreements, and guide the evaluation team through the RFP process.

EVALUATION TEAM LEADER (PRIMARY CONTACT FOR PURCHASING BUYER)

Name:		Department:	
Campus Phone:		Email Address:	
RFP TITLE		Projected Budget:	

Provide a brief description of the goods or services required:

DEPARTMENT APPROVAL (MUST BE SENIOR TO BE EVALUATION TEAM LEADER)

By signing below, the department certifies that the information submitted with this form has been reviewed, the department approves moving forward with the project and that appropriate funding is available.

Signature: _____ Date: _____
(business officer, department chairman, or dean)

Printed Name: _____ Title: _____

PROJECT INFORMATION QUESTIONNAIRE

Check the appropriate box for each question below:

General Information:

1. Is this a request for a good or service? **Good** **Service**
2. If service, will this be a one-time or ongoing service? **One-time** **Ongoing**
3. Do you anticipate that the award will result in a purchase order or contract?
 PO **Contract** **Unknown**
4. Do you anticipate the need for a Pre-Proposal Conference? (Typically held only if suppliers would need to view a space, take measurements, etc. in order to respond to the RFP)
 Yes **No** **Unknown**
5. Do you have a copy of a current or former PO / contract for this good / service? If yes, submit the copy with this form. **Yes** **No**
6. Are there any existing contracts for the good/service or that relate to the good / service that the suppliers need to be aware of? **Yes** **No**
7. Does the team anticipate the need for on-site demos / presentations by suppliers? **Yes** **No**

Budgetary Information:

1. What account number will be used for advertising? _____
2. What is the estimated total cost/payment (include any extensions/renewals)? _____
3. Will the good/service be funded by a grant? **Yes** **No**
4. If yes, what grant? _____
5. Fiscal Year for budgetary spend for this project: _____

Project Timing and Length:

1. When do the goods or services need to be in place / started by supplier?

2. Are there any special considerations for when (e.g., only in summer, normal business hours, etc.) work can be performed by supplier? (If yes, note special considerations in scope of work.)
 Yes **No**
3. If ongoing service, what is the desired contract term (length)? _____
4. If one-time service, enter the date that work must be completed by: _____

ADDITIONAL INFORMATION REQUIRED FOR RFP PREPARATION

There are several items that the department is responsible for providing to the Business Office can prepare the RFP bid document. The team lead will work with the proposed evaluation team members and other project stakeholders to address these items. **The following information must be submitted via email to the Business Office (purchasing@grayson.edu) along with this form in a separate Word document and be clearly identified as belonging to one of the seven headings listed below.** Failure to submit all required information will result in the return of the form to the department.

Contact Penny Ticknor in the Business Office if you have questions about the information required or to request a meeting to discuss your project prior to submitting this form.

1. Background Information and Special Circumstances

Provide information about the project or the department that the suppliers will need to know in order to determine if they want to respond to the RFP. Information provided must be relevant and concise. This is not the place to put scope of work (SOW) requirements. Examples of things to consider include:

- What is the purpose of the RFP? What is the team trying to accomplish?
- Current environment description: How do things work today and do they need to be maintained or changed? What is the current volume of activity?
- Are there special considerations involved? Any dependencies on other groups or projects?

2. Detailed Scope of Work (SOW)

Provide the detailed SOW. The SOW is the most important part of any RFP and must be written and reviewed carefully. The SOW will become the basis of the resulting PO or contract and must contain everything the department wants the supplier to do on the project. It must be clear and concise. It must not use ambiguous or vague language open for interpretation by the reader. For example, don't say "Contractor will submit reports on a regular basis." Instead say "Contractor will provide reports to the college on a monthly basis." Minimum or Preferred Qualifications (supplier location, certifications, years' experience, etc.)

- College Rights and/or Responsibilities (list any items the college would provide that the supplier doesn't need to worry about – parking spaces, electricity, drawings, etc.)
- Contractor Rights and/or Responsibilities (can include items the supplier must provide when performing the work, qualifications of supplier's staff, permits, etc.)
- Scope of Work (detailed description of everything the supplier is expected to do in the performance of the job including but not limited to: description of job to be done, work hours, reporting, training, work locations, uniforms, etc.)

The team must consider the current contract, if any, and address items they wish were clearer or have had issues with.

3. Evaluation (Best Value) Criteria

Provide the proposed evaluation criteria for scoring proposals and proposed weight of each (up to 100%).

Evaluation criteria are the criteria, including cost, that are used to decide which supplier is awarded the contract. Each criterion is given a weight, up to 100% in total. Cost and Vendor Experience are two required criteria. Cost is generally not less than 30% of the total. Additional functional and/or technical criteria can include but are not limited to:

- Quality of Goods/Service
- Implementation plan, operational plan, training plan, service plan, etc.

- Software or technical design, elements, etc.
- Staffing and Resources
- Proposed Products
- Strategic Direction
- Licensing and Maintenance

The team may find that coming up with evaluation criteria questions first (see item #4 below) can help determine what the criteria should be.

4. Evaluation Criteria Questions

Provide a list of questions the evaluation team would like to ask the suppliers. The team must note the evaluation criteria each question falls under.

The questions are important as they are what the evaluation team will use to decide which supplier is the best fit for the college. The team will score each answer provided to the questions using a predetermined scale. Yes / no type questions should be avoided, if possible. Suppliers can be asked to describe how they do things, what their methodologies are, what problems they've encountered on similar projects and the resolution, etc. Questions should be arranged so that broad questions are asked first followed by specific questions. An example of two required questions under the Vendor Experience criteria is below. First suppliers are asked about their overall experience and then their specific experience with the college.

1. Provide references from three (3) of Proposer's customers from the past five (5) years for services that are similar in scope, size, and complexity to the Services described in this RFP. Provide the following information for each customer:
 - Customer name and address;
 - Contact name with email address and phone number;
 - Time period in which work was performed;
 - Short description of work performed.
2. Has Proposer worked with the College in the past five (5) years? If "yes," state department name, department contact, and provide a brief description of work performed.

The number of questions asked will vary with each RFP and each evaluation criteria. A general rule is to have 3-10 questions per evaluation criteria. It is important to note that all questions within a criterion are weighted the same. A criterion worth 20% that has two questions will make each question worth 10% of the overall RFP score. Another criterion worth 20% with 10 questions will make each question worth 2% of the overall RFP score. After the Business Office reviews the questions submitted, they will suggest the addition, the removal, or general edits to the questions.

5. Evaluation Team

Provide the names, titles, and email addresses of the desired evaluation team members (three to five is recommended). A minimum of 2 members of Business Services should be included as part of the evaluation team– typically the VP for Fiscal Services and always the Assistant Director of Fiscal Services.

Evaluation team members must be able to dedicate time to the project. They will be required to review/edit RFP drafts, attend team meetings, be available to answer questions, be available to review and evaluate RFP submissions, etc.

6. Known Suppliers

Provide a list of qualified companies the team wants the Business office to email the RFP. The list must include: company name, contact name, and contact email address.

7. Pricing Schedule Ideal

Provide information about the department's preferred/desired pricing schedule. Examples of things to consider include:

- How is the good / service paid for now? Is the same method desired for this project?
- What is the payment norm for the industry?
- Will there be any one-time or start-up costs in addition to ongoing costs?
- Should there be one lump sum payment for the project or multiple payments made over time?
- If multiple payments, when should the supplier be paid? After milestone or phase completions?
- If multiyear project, will payments vary across years?

The RFP's pricing schedule will be reviewed and scored by the Business Office, therefore the pricing schedule must be written in a way that leaves no room for interpretation by the buyer during evaluation. The evaluation team will not see the submitted pricing information until after the scoring of the functional and/or technical criteria has been completed.

PURCHASING OFFICE USE ONLY

Intake form and RFP information received:

Date: _____

RFP assigned number: _____

Date: _____

Notes: