

**AGENCY LEAD AND CONTRACTS AND PROCUREMENT
INSTRUCTIONS & RESPONSIBILITIES FOR RFPs**

RFPs for consulting or professional services over \$50,000

1. Agency Lead initiates the development of the RFP:

- Performs research and fills out the RFP Development Worksheet or updates previous RFP.
- Liaison for their Agency through completion of a fully executed contract.
- Carefully review the Committee Member's Handbook.
- If the budget is over \$100,000 provide a copy of the RFP to the Agency Attorney

2. Agency Lead recommends members for a Select Committee:

- Include knowledgeable members representing the agency's division, their department, other divisions, or community representatives.
- The Selection Committee including approximately 5 or 7 members. 2-3 should be from the Agency and 2-3 should be from the community or another County Agency.
- Non-scoring Committee members (with the exception of Procurement) are not allowed to view proposals or attend meetings.
- Confirm Committee members are willing to serve on the Selection Committee.
- Procurement will provide instructions to the Selection Committee.

3. 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 or updated previous RFP

4. Agency Lead Assists Procurement in distribution and review of proposals

- Distribute proposals and a copy of the RFP along with score sheets to Committee Members prior to the meeting.
- Each Committee Member should individually score the proposals following the guidelines in the handbook.
- Discuss evaluation methodology with Committee Members (if a pre-score meeting is held) to ensure that everyone understands the meaning of each criterion.
- Read each proposal completely and inform Procurement of any deficiencies or concerns.

5. 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(s).

6. 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.
- Responsible for seeking minor clarifications from the Proposers and allows the Committee Members to appropriately revise scores.
- Collect score sheets from each Committee Member and rank on master scoring matrix.
- If interviews are needed and/or required the scores will be used to define who the top ranked firms are for scheduling the oral presentations and/or demonstrations.
- Collect proposal copies for Committee Members of firms not receiving an interview.

7. Before Interviews, Agency Lead will:

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

8. 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 firms that are potentially acceptable are invited to participate in oral presentations/demonstration.

- The Selection Committee will determine if interviews would be helpful.
- Procurement will contact Proposers being interviewed.
- E-mail questions to the Proposers being interviewed.
- When all firms have confirmed they will attend the interview, send an e-mail to let the Committee Members know the times.

9. Guidelines and Parameters for coordination of oral presentation and/or demonstrations.

- Procurement will serve as facilitator for all meetings.
- 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 oral presentation is only to allow Proposer to clarify a statement in their proposal.

- The original proposal cannot be changed in any aspect at the oral presentation/demonstration.
- If during oral presentations 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 are completed, Procurement will conduct final scoring to determine the awarded firm or firms.
- Collect score sheets from each Committee Member.
- Rank on master scoring matrix.

10. 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.

11. Procurement will compile all evaluation-related documentation.

- Collect all Committee Members proposal copies along with all individual score sheets.