

# Agency Lead and Contracts and Procurement Instructions & Responsibilities for RFPs

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*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 Information Worksheet.
- Liaison for their Agency through completion of a fully executed contract.
- Carefully reviews the Committee Member's Handbook.
- If the budget is over \$100,000, Agency shall provide a copy of the RFP to the Agency Attorney

## **2. Agency Lead may recommend members for a Select Committee**

- Include knowledgeable members representing the agency's division, their department, other divisions, or community representatives.
- 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.
- Non-scoring Committee members (with the exception of Procurement) are not allowed to view proposals or attend meetings.
- 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. Agency Lead and Contracts & Procurement will distribute and review proposals**

- Procurement will facilitate a pre-score meeting to distribute the proposal 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 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.
- Agency Lead will 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 interview 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 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 are completed, Procurement will conduct final scoring to determine the awarded firm or firms.
- Procurement will collect score sheets from each Committee Member.
- Procurement will 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. Contracts and Procurement will compile all evaluation-related documentation.**

- Collect all Committee Members proposal copies along with all individual score sheets.
- Prepare a recommendation for Mayor Office's signature.
- Prepare score sheets for record requests.
- Prepare PDFs of proposals for record requests.

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

- Procurement will send a request to the Agency Attorney to prepare the agreement.
- Agency and Procurement will negotiate a contract with the Proposer.
- Agency will take lead on obtaining authorized signature for Proposer.
- Procurement will take the lead to input into PeopleSoft and obtain the County's authorized signature.