

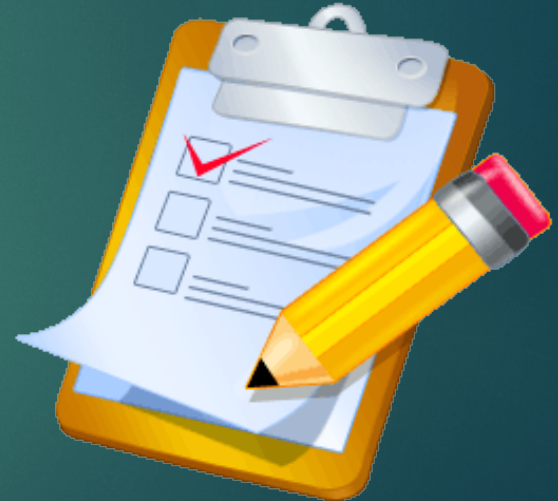
Pre-Award Procedures

GETTING TO THE AWARD

Jesse Sutton, Purchasing/Accounts Payable Specialist, Southfield Public Schools

Agenda

1. PROJECT DEVELOPMENT
 - Backwards Planning
2. BUILDING RFPS (REQUESTS FOR PROPOSALS)
3. EVALUATION



1. Project Development

Understanding Your Project...

- The Framework of the Project
 - What is the Goal – The Big Picture?
 - What are the details needed to make it happen?

Being thoughtful and intentional in the beginning is key to a successful outcome!

Communication

- Communication and Putting Your Team Together
 - (Evaluation Team)
- Has this group of people worked together before – are there things that need to be discussed and/or mutually understood?
- Who is the end-user (internal players)?
- Consultants (external players)?
- Who is your audience (possible vendor pool)?
 - (Bid sites & invites)

Consultants & Project Managers

- Bonds and Other Projects
 - Does contract delineate who does what?
 - Are any tasks being overlooked?
 - Shared or new forms/documents/resources?
 - Processes
 - Marketing extension

Evaluation Committee

6

AVENGERS ASSEMBLE!!!

- DEVELOP EVALUATION COMMITTEE
 - Procurement
 - End user(s)
 - Technical expert
 - Specialists (legal, engineer, consultant)
 - Other stakeholders and SMEs for the project



Evaluation Team receives instructions and gives commitment to complete their RFP duties

Evaluation Committee

7
AVENGERS ASSEMBLE!!!

- DEVELOP EVALUATION COMMITTEE
 - [Identify Evaluation Team](#)
 - [Evaluation Team Member Notice](#)
 - [Evaluation Team Member Agreement](#)



Evaluation Team receives instructions and gives commitment to complete their RFP duties

Developing the Schedule

- Work backwards
 - Best time of year for project/service & service delivery dates.
 - FY July 1 / GY October 1 / other start dates
 - When is product needed and least expensive?
 - Target Board meeting date
 - Availability of evaluation team members
 - **Assemble your Avengers EARLY**
 - Seasonal trends/other factors of vendor pool

2. Building RFPs

- COVER PAGE
 - Objective*
- TABLE OF CONTENTS
- PURPOSE/INTENT
- INSTRUCTION FOR SUBMITTER
- TERMS AND CONDITIONS (MSA TEMPLATE)
 - Master Service Agreement
- SPECIFICATIONS (SOW TEMPLATE)
 - Scope of Work
- EVALUATION CRITERIA
- PRICING FORM (BID RESPONSE)
- REQUIRED FORMS
- [MSA & SOW](#) [RFP TEMPLATE](#)

Cover Page

10

- RFP NAME
- RFP NUMBER (IF HAVE)
- DUE DATE AND TIME
- BUYER NAME
- LOGO/ISD OR LEA NAME
- DATE RELEASED/ISSUED

The image shows a cover page template for a Request for Proposal (RFP) from Oakland Schools. The page is white with a dark teal background on the left side. The Oakland Schools logo is in the top left corner. The title "Request for Proposal" is centered. Below it, the text "Title of Services, software, equipment" is highlighted in yellow. Below that, "RFP #XX.XXXX" is highlighted in yellow. At the bottom left, the text "Issue Date: XX/XX/XX", "Proposal Due Date: XX/XX/XX", and "Contracting Officer: XXXX XXXX" are listed, with the dates and officer name highlighted in yellow.

OaklandSchools

Request for Proposal

Title of Services, software, equipment

RFP #XX.XXXX

Issue Date: XX/XX/XX
Proposal Due Date: XX/XX/XX
Contracting Officer: XXXX XXXX

Having a pre-cleared RFP template is helpful

Objective

- Clearly state the objective to be met through the award of the RFP.
 - Example: The objective is to enter into a five-year contract with the selected submitter to furnish and maintain electronic document imaging solutions for various departments of the district.
- Can be short, especially if you have a Specification section

Table of Contents

12

- Not required but helpful
- List sections
- List appendix
- List forms
- Reference page numbers



TABLE OF CONTENTS

REQUEST FOR PROPOSAL

(INSERT TITLE OF RFP HERE)

	<u>PAGE</u>
SECTION I: REQUEST FOR PROPOSAL PURPOSE AND SCHEDULE.....	3
SECTION II: INSTRUCTIONS TO OFFERORS.....	4
SECTION III: GENERAL CONTRACTUAL TERMS & CONDITIONS.....	7
SECTION IV: SPECIAL CONTRACTUAL TERMS & CONDITIONS.....	13
SECTION V: SPECIFICATIONS.....	15
SECTION VI: OFFEROR QUESTIONS.....	17
SECTION VII: FEE PROPOSAL.....	18
SECTION VIII: CERTIFICATION.....	19
SECTION IX: NOTARIZED FAMILIAL and RELATIONSHIP DISCLOSURE AFFIDAVIT.....	20
SECTION X: EXCEPTION TO SPECIFICATION FORM.....	21
SECTION XI: OFFERORY INFORMATION FORM.....	22

Purpose

13

- State accepting proposals from qualified individuals, firms, partnerships, and corporations having specific experience in the area identified in REP
- Background on ISD/LEA
- Background on department overseeing project
- Background on project



SECTION 1: REQUEST FOR PROPOSAL PURPOSE AND SCHEDULE

1. **PURPOSE:**
Oakland Schools is requesting proposals forsolution.....for its (enter all locations).
2. **BACKGROUND INFORMATION: OAKLAND SCHOOLS** (suggested language)
Oakland Schools is one of 37 intermediate school districts (ISD) in Michigan. As an ISD, we are a regional service provider to the local public school districts located in Oakland County, Michigan. Oakland Schools is an autonomous, tax-supported public school district governed by Michigan General School Laws. In addition, Oakland Schools operates four NCA Accredited regional technical campuses that have career focused curriculums with an enrollment of more than 2,500 students who attend half-day sessions (morning and afternoon sessions are offered) at campuses located in Clarkston, Pontiac, Royal Oak, and Wixom.

BACKGROUND INFORMATION: OS TECHNOLOGY SERVICES DEPARTMENT (for use if Technology services)
Technology Services is an established provider of high quality systems solutions and support to Michigan public schools, nonpublic schools and public school academies in Oakland County. They provide a full suite of software and service alternatives in support of student information management, human resource management, financial systems management, academic systems support for the Oakland Network for Education (ONE) fiber network, as well as desktop support and a comprehensive professional development program.

BACKGROUND INFORMATION: MICHIGAN WORKS! JOBLINK SERVICE CENTER (for JobLink)
Oakland Schools' JobLink Service Center is located at 1850 North Perry Street, Pontiac, MI 48341 and it is a Service Center that provides multiple job training opportunities and support services to customers through the Workforce Development Act, the Jobs Education and Training (JET), the "Trade Globalization Adjustment Assistant Act" TGAA, and Employer Services. Oakland Schools is the fiduciary for the Michigan Works! JobLink Service Center at this location.

3. REQUEST FOR PROPOSAL SCHEDULE:

Pre-Proposal Conference
Deadline to submit clarifying questions
Question responses posted to MITN
Proposals due date
Tentative interviews/presentations
Board approval
Contract start date

Instructions to Submitter

14

- Clearly state the proposal's due date, time and where to deliver
- State how the proposals are to be labeled
- Public bid opening or not
- Proposal acceptance/rejection clause
- Provide questions contact and deadlines
- Describe required bonds and insurance
- Addenda process
- Building closure policy
- Withdrawal and exception process
- Interview and sample requirements
- Pricing form instructions, if applicable
- Debriefing process
- Notice of award policy
- Protest and disputes policy
- Work hours



Terms and Conditions (MSA)

15

General indemnification and Nondiscrimination	Compliance with Federal, State and local laws
Termination for convenience	Severability
Ownership and Intellectual property	Assignment and subcontracting clauses
Infringement	Detailed description of bonds and insurance requirements
Freedom of Information Act (FOIA)	Michigan right to know/hazardous material law
Immunities	Security clearance
Independent contract status	Tax exempt
Hold harmless	Invoicing and payment
Conflict of interest	Confidentiality agreements
Governing law	Notice
Michigan school safety legislation	Non-Waiver
Iran economic sanctions act	Familial Statement

Special Terms and Conditions

16

- Contract term
- Warranty requirements
- Contract pricing extended to others (piggyback)
- Site visit and interview information
- Non-appropriations Clause
- School safety requirements
- Protection of building and vegetation
- Voluntary alternates
- Rebates and discounts

Types of Specification

17

- Design specifications
 - Most traditional and restrictive
 - Essential when structure/product is to be constructed/ manufactured to meet clients specific needs
 - Used in public buildings, highways, bridges
- Performance (functional) specifications
 - Best method of describing requirements
 - Describes what the item is expected to do
 - Less concerned about material and manufacturing
 - Evaluated on performance when put to use
- Combination specifications
 - Used on complex purchases
 - Combines two or more specification types
 - Design-performance specifications with design requirements kept to minimum while performance characteristics are very detailed.

Writing Specifications

- When writing specification ask yourself:
 - Who will receive the document?
 - What do I want people to know?
 - What should be my tone or approach?
 - How detailed and exact should my information be?
 - What can I assume about my audience's knowledge of the subject?
 - What might their questions be?
- A specification should:
 - Allow for competition
 - Identify measurable physical, functional, and quality characteristics
 - Be specific in the stipulation of all requirements, either directly or by reference to other specifications, publications, or drawings
- Requirements should include:
 - Basic design, weights, grades of materials, physical dimensions, percentage and types of ingredients, and function

Characteristics of Specifications¹⁹

- Appropriate use of words
- Technical writing principles and techniques
- General form and content
- Definitions of terms used in specifications
- Measurements
- Figures and tables
- Grades, classes, types, composition, etc.
- Reference to other specifications, standards, and publications
- Sampling, inspection, and test procedures
- Preparation for delivery

Critical Ingredients of Good Specifications

- Good specifications have to be:
 - Consistent
 - Easy to read and understand
 - Easy to revise
 - Formatted with good direction
 - Common among agencies, departments, divisions, etc.
 - Categorized
 - Organized with good numbering system

Elements of SOW (Specifications)

- Items that may be included in Statement of work (SOW):
 - Background
 - General scope
 - Objective
 - Functional/performance/design specifications
 - References to related studies, documentation, specifications, or standards
 - Data required
 - Support equipment
 - Entity and contractor's furnished property, facilities, equipment, and services

3. Evaluation

(Reaching the Goal)

- Evaluation criteria must be within the RFP
 - Technical criteria
 - Qualification
 - Experience
 - Certified/licensed
 - Vendor information (financials & equipment)
 - Training
 - Pricing

Committee Functions

- EVALUATION COMMITTEE & FUNCTIONS
 - Apply evaluation criteria from RFP only
 - Evaluate proposals individually and/or discuss
 - Rank and/or develop a short list
 - Interview/obtain clarifications
 - Negotiate and finalize contract terms
 - Recommend award



Evaluation Committee

- ROLE OF PROCUREMENT - (REFEREE)
 - Serve as committee chair
 - Votes, if voting member
 - Review proposals for responsiveness
 - Ensures integrity of procurement process
 - Ensures compliance with RFP requirements
 - Schedules committee meetings
 - Schedules vendor interviews
 - Keeps minutes and files
 - Corresponds with RFP respondents
 - Negotiates financial issues

Evaluating RFPs

- ROLE OF USERS AND TECHNICAL COMMITTEE MEMBERS
 - Develop Scope of Work (SOW)
 - Technical requirements
 - Develop budget estimates
 - Develop technical questions for interviews
 - Negotiate technical RFP aspects
 - Provide technical input

Responsiveness

26

- PROCUREMENT REVIEWS PROPOSALS FOR RESPONSIVENESS AND IDENTIFIES:
 - any minor irregularities and informalities
 - any substantive difference between RFP and the proposals terms and conditions, inconsistencies and errors in quantitative or other reasoning
 - Informalities examples:
 - Failure to provide information on number of employees
 - Failure to provide correct number of copies
- RESPONSIBLE BIDDER -
A VENDOR, BUSINESS ENTITY OR INDIVIDUAL WHO IS FULLY CAPABLE TO MEET ALL OF THE REQUIREMENTS OF THE SOLICITATION AND SUBSEQUENT CONTRACT.
 - Capability financial and technical
 - Document the ability to provide good faith performance (merchant with fair & honest dealings)

Informalities

- INFORMALITIES THAT MAY BE WAIVED:
 - Failure to provide certain bidder information, such as number of employees
 - Failure to provide correct number of copies
 - Failure to provide adequate catalogues or brochures for products purchased
 - Failure to submit **certain** required forms or documents regarding the proposal
 - Qualifications or ability to perform (financial statements, non-collusion affidavits)

Mandatory Requirements Review

- MANDATORY REQUIREMENTS “MUST” OR “SHALL” ARE ESSENTIAL NEEDS WITHIN THE RFP DOCUMENT THAT MUST BE MET BY THE PROPOSER.
- FAILURE TO MEET MANDATORY REQUIREMENTS MAY RESULT IN GROUNDS FOR DISQUALIFICATION

Responsible Bidder

29

- A CONTRACTOR, BUSINESS ENTITY OR INDIVIDUAL WHO IS FULLY CABLE TO MEET ALL THE REQUIREMENTS OF THE SOLICITATION AND SUBSEQUENT CONTRACT.
- ANALYZE PROPOSALS ON THE FOLLOWING TO DETERMINE IF VENDOR IS RESPONSIBLE:
 - Experience
 - Integrity
 - Capacity, Facilities, Equipment
 - Credit
 - Supplier experience
 - Reference checks

Proposal Evaluations Techniques

30

Document
Document
FOIA,
Challenges,
Litigation
Document

- NUMERICAL SYSTEM EVALUATIONS
 - Fixed Weights
 - Variable weights
- VERBAL EVALUATIONS
 - Go, No Go
 - Tradeoff Analysis
 - Lowest price proposal
 - Adjective Ratings

Research: Price Analysis

31

THIS TAKES TIME!!

- PRICE ANALYSIS – EXAMINATION OF SELLER'S PRICE, BID, OR PROPOSAL BY COMPARISON WITH REASONABLE PRICE BENCHMARKS WITHOUT EXAMINATION AND EVALUATION OF COST ELEMENTS AND THE PROFIT MAKING UP THE PRICE.
- REVIEW THE COMPETITIVE PRICE PROPOSALS
- COMPARE WITH CATALOG OR PUBLISHED PRICE DATA
- COMPARE WITH HISTORICAL DATA
- OBTAIN PRICING FROM OTHER DISTRICTS ON SAME PRODUCTS
- END RESULT IS TO ENSURE FAIR AND REASONABLE PRICING ON PRODUCTS OR SERVICES PROCURED.
- OUTCOME ASSISTS WITH NEGOTIATIONS

Research: Cost Analysis

32

- COST ANALYSIS – REVIEW AND EVALUATE ACTUAL OR ANTICIPATED COST DATA. THE DATA INCLUDES:
 - Labor
 - Materials
 - Overhead
 - General and Administrative cost
- OUTCOME ASSISTS WITH NEGOTIATIONS

THIS TAKES TIME!!!

Total Cost of Ownership

33

THIS TAKES TIME!!

- TOTAL COST OF OWNERSHIP – THE TOTAL COST OF OWNERSHIP OVER THE LIFE SPAN OF THE ASSET.
- TAKES INTO ACCOUNT THE FOLLOWING COSTS:
 - Operating
 - Maintenance
 - Time value of money
 - Disposal
 - Other associated cost
 - Residual value
- OUTCOME ASSISTS WITH NEGOTIATIONS

Vendor Analysis

34

THIS TAKES TIME!!

- DEVELOP A VENDOR SHORT LIST BASED ON COMMITTEE EVALUATIONS.
 - Interview suppliers
 - Check references
- IF INTERVIEWS AND REFERENCES ARE SCORED THAN UPDATE COMMITTEE EVALUATION FORM TO DETERMINE VENDOR WITH BEST VALUE

Determining Award

- THE BEST-VALUE APPROACH
 - source selection, weighted technical evaluation factors used to rate proposal.
 - Best value is a process used in competitive negotiated contracts to select the most advantageous offer by evaluating and
- COMPARING FACTORS IN ADDITION TO COST OR PRICE.

Best And Final Offer (BAFO)

- BEST AND FINAL OFFER CAN BE REQUESTED OF THE SHORT LIST VENDORS IF DISCLOSED WITHIN RFP AS A POSSIBLE NEGOTIATION TOOL
- BAFO IS A RECOGNIZED TOOL WITHIN RFP PROCESS, WHICH ALLOWS VENDORS TO CHANGE PRICING AFTER PROPOSAL RECEIPT.
- SPECIFICATIONS CAN NOT BE ALTERED
- BAFO ARE RANKED ON THE MATRIX ISSUED WITH RFP FOR BOTH TECHNICAL EVALUATION AND PRICE

Cautions

- USING CONSULTANTS
 - To develop RFP SOW/specifications
 - To oversee the entire process
 - Knowing TCO of the project
- SALE AND USE TAX
 - Items incorporated into realty
 - Buying goods/installing later
 - District purchases boiler from cooperative bid and has it installed by outside trades.
 - Coops and Construction
- PERCENTAGE OFF BIDS

Questions?

38



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Lunch - 12:00 - 12:45 pm

