RFP Customer Guide

Objective: This guide is designed to assist our customers (Ohio University community) with the Request for Proposal (RFP) process from start to finish. This process includes development, release, proposal review and award of the final contract.

RFP Purpose: The purpose of the RFP is to allow an open bidding process for any goods, services and/or construction that are over the set bid limits. The open bidding process must be transparent and compliant with all state and federal regulations outlined for a public institution. The RFP process will allow suppliers an equal opportunity to bid for Ohio University business and to know the selection criteria for which the bid will be awarded. All documents involved in the RFP process become public record once the award is granted.

Policy

With very few exceptions, all purchases that represent a purchase commitment over the bid limit must be bid.

Bid limits:
- Goods: $25,000
- Services: $50,000
- Construction: $200,000

**amounts are per fiscal year, per supplier

Glossary:
Customers – Ohio University community
RFP – Request for Proposal
RFQ – Request for Quote
Procurement – Department within the Procure to Pay Service group, located in WUSOC
Selection Committee – Chosen by the customer (3+ members preferred)

Roles and Responsibilities:
The procurement commodity manager assigned to the desired commodity will manage the RFP process. The OHIO customer is responsible for providing the supporting details, timeline and scope of work.
Process Flow Diagram: OHIO Customer Responsibilities (Green) and Procurement Responsibilities (Peach)

- Provide a list of suppliers to invite to participate
- Providing specific history and current information
- Providing the full scope and description
- Providing Specific Criteria for bid proposal evaluation
- Providing Specific Requirements to be Responsive
- Identifying selection committee members
- Identify the score sheet criteria and weight each criteria
- Seek additional input from other key campus partners
- Outline review process and schedule
- Reviewing and approving the Draft RFP

- Work with the customer to develop the RFP
- Release RFP to Ohio’s Public Sourcing Portal
- Create an addendum relating to SOW if necessary
- Consolidate all formal questions into one document and provide to customer(s) for answers
- Once answers are received, answers to questions will be posted on Ohio’s Public Sourcing Portal
- After due date, all documents to Ohio University’s Box for review by the selection committee
- Schedule a meeting with selection committee to score the responses
- Vendor Interviews/Presentations (if applicable)
- Selection committee will conduct their final scoring
- Write a letter of recommendation, intent to award and contract negotiations
**Process – Customer Role:**

1. Provide a list of suppliers to invite to participate including email addresses
   a. Although all RFP’s are publically posted, Procurement will pre-invite specific suppliers that you identify to register for Ohio’s Public Sourcing Portal.

2. Providing specific history and current information
   a. Describing the history of this commodity/what is being bid and anything that would assist the supplier in better understanding why we are requiring this good or service.
   b. Providing past studies, tools, and information that would provide a better background in the RFP

3. Providing the full scope and description of what we are seeking
   a. Providing as much detail as possible including project start and end dates
   b. Providing the desired contract length
      i. Example: Ohio University is seeking a three year agreement with two optional (1) year renewals
   c. Providing project goals and objectives, tasks, and deliverables

4. Providing Specific Criteria for bid proposal evaluation
   a. The Procurement RFP template has standard language for proposal evaluation but any additional criteria can be added. This criteria must align with the score sheet criteria so that suppliers know the basis upon which they will be scored.

5. Providing Specific Requirements to be Responsive to the RFP
   a. Examples include:
      i. Potential bidders are encouraged to participate in a pre-bid meeting on X date
      ii. Industry certifications or licensure
      iii. System compatibility

6. Identifying selection committee members (recommend 3 or more members)

7. Committee should collaborate and identify the score sheet criteria and weighting of those criteria if applicable

8. Seeking additional input from other key campus partners such as:
   a. Office of Information Technology
   b. Department of Transportation Services
   c. Real Estate and Engagement
   d. Office of Research and Sponsored Programs
   e. Environmental Health and Safety

9. Outline review process and schedule

10. Reviewing and approving the Draft RFP

11. **Important Note: Customers must refrain from discussing the bid with any current suppliers participating in the bid. They may interact to conduct normal business.**
Process – Procurement Role:
1. Work with the customer to develop the RFP including;
   a. Timeline
      i. Release date
      ii. Deadline for questions and answers
      iii. Due date
      iv. Finalist presentation dates (if applicable)
      v. Anticipated award date (estimate in generalities)
   b. Current information and detailed scope outlined in the Customer Role section
   c. Score sheet criteria
2. Release RFP to Ohio’s Public Sourcing Portal
3. Procurement will create an addendum to add additional information pertaining to specifications or scope of work if necessary
4. Procurement will consolidate all formal questions into one document and provide to customer(s) for answers
5. Once answers are received, Procurement will post answers to questions on Ohio’s Public Sourcing Portal as either a message or addendum depending on complexity of questions.
   a. All suppliers will receive formal Q&A message
6. After due date, Procurement will download all response attachments from the bidding portal, review each response for completeness of RFP deliverables, and will upload all documents to Ohio University’s Box cloud storage solution for preliminary review by the selection committee
7. Procurement will contact Customer to schedule a meeting with selection committee to discuss the following:
   a. Bid Responses
   b. Committee scoring (We suggest that scoring be completed prior to this meeting) (if required)
   c. Which proposal(s) if any can be eliminated from finalist consideration and why
   d. Which proposal(s) are considered finalist and why (This can be determined by the score sheets)
      i. determine who will be invited for an on campus presentation (if applicable)
      ii. discuss presentation agenda and scoring method
   e. Procurement will facilitate the scheduling of all presentations with suppliers who made the short list (if applicable)
8. Vendor Interviews/Presentations (if applicable):
   a. If presentations are scheduled, each vendor finalist will be given an equal opportunity to discuss their proposal with the Selection committee
   b. The Selection Committee will create the presentation agenda and each respondent will have the same agenda and allotted time to ensure fairness to all suppliers
   c. Final scoring to include presentation criteria that will be developed with Procurement prior to the presentation
9. Procurement will contact the selection committee to schedule a presentation review meeting to include the following:
   a. Discuss which presentation was most favorable
   b. Discuss second round of scoring
   c. Decide whether to request Best and Final Offer (BAFO)
   d. Discuss which finalist is winning bidder
10. Procurement representative will prepare and present a formal recommendation to the Director of Procure to Pay Services. Depending on the dollar amount of the commitment and/or the impact to the entire campus, the
recommendation may have to be approved by Senior Management. Upon approval of recommendation of the intent to award, the procurement representative will issue the intent to award notification to the winning bidder pending successful negotiation of a contract.

a. Once the intent to award notification has been communicated to successful bidder, communication between the customer and successful bidder may resume

b. Once the intent to award notification has been communicated to the successful respondent, the non-successful bidders will be notified.

c. Assistant Director of Contracts will facilitate contract negotiation between Ohio University and awarded supplier seeking customer input and Legal Affairs input as needed. If the RFP was a quote, contracts will only need to review if terms and conditions are mentioned in the quote.

d. Once your contract has been fully executed (by both parties) and a purchase order has been issued, the RFP process is considered complete and product delivery or services specified may begin

Links: https://www.ohio.edu/finance/procuretopay/procurement/policies.cfm