

# INSTRUCTIONS

The requesting department should be able to answer the following questions before beginning the RFP process. Please use the following as a work sheet to help you resolve questions before opening the [Blank Template](#), which will be sent to Purchasing for processing your request.

1. Description: Supply a one or two line description of the product/services required.
2. Objective/Goal: This section should indicate the need for the service and the primary outcome expected as a result of the purchase/services rendered. The information should be clear and specific enough to communicate to Suppliers the expectations associated with the required services or products.
3. Scope: This section should list all items being purchased, or list the primary services to be performed by the successful Supplier. Note: Be sure to be as specific as possible regarding the services to be performed. The information recorded will become part of the final contract. The proposer may propose an alternative plan/product to meet the above need and achieve the objective/goal.
4. Qualifications: This section should indicate the necessary qualifications that the Supplier or their personnel should have in order to provide the required services. List the type of information and data required of each Supplier used in the evaluation process. Examples include: training, experience, references and/or licenses.
5. Evaluation: List any and all factors that will be used by the assigned Evaluation Team to determine a recommendation for award. An award will be made to the Supplier, based on the evaluation team's recommendation, to be the best qualified, based on the evaluation factors set forth in this section of the RFP. This could include pricing, experience, service, warranty, etc. The evaluation team will make their recommendation in writing, including a scorecard, which clearly shows the evaluation factors and the rankings of each firm submitting a proposal.
6. Duration of Contract: This section should indicate the timetable during which the services will be provided. The time period can refer to a specific date or a date range including a statement to the effect of "no later than". After an award has been made, this date cannot be extended. This section should also state the duration of the original contract period and the number and length of any options to renew, if applicable. NOTE: No contract may exceed ten (10) years.
7. Sub-Contractors: State whether the Supplier will be allowed to utilize Sub-contractors?

Yes                       No                       No Preference

Note: The Procurement Code requires that the Contract indicate if a subcontractor will be used in performance of the requested services. If subcontractor(s) will be used, each

subcontractor must be listed along with the anticipated amount they will be paid. Additionally, the Contractor cannot add or change an identified subcontractor without written notification to the University and approval of such modification by the University

8. University Department Representative: Please list the Department Representative for this request, and their campus contact information.
9. Reports and other deliverables: Indicate reports (if any) the successful Supplier will be required to provide.
10. Renewal Options: If request is for service, a renewal option may be stated in the Request for Proposal. If no renewal option is listed in this document, renewals of the contract will not be granted.

Following are options of language you may insert in the Request for Proposal:

**NOTE: OPTION TO RENEW**

The University shall have the option of extending the same terms, conditions, and pricing structure for an additional \_\_\_\_\_ year period (s) beginning \_\_\_\_ contingent upon continuing need, availability of funds, and satisfactory service from the supplier.

The University desires an option to renew this Contract for the period of **(MM, DD, YY)** though **(MM, DD, YY)** at the Proposal prices and stated conditions, contingent upon continuing need, availability of funds. Please indicate your option offer below.

\_\_\_\_\_ Prices will remain firm for the option period

\_\_\_\_\_ Prices will increase up to \_\_\_\_\_ % for the option period

\_\_\_\_\_ Prices will decrease up to \_\_\_\_\_ % for the option period

\_\_\_\_\_ We do not offer an option

The University desires an option to renew this Contract for the period of **(MM, DD, YY)** though **(MM, DD, YY)** at the Proposal prices and stated conditions, contingent upon continuing need, availability of funds. Please indicate your option offer below.

\_\_\_\_\_ Prices will remain firm for the option period

\_\_\_\_\_ Prices will increase up to \_\_\_\_\_ % for the option period

\_\_\_\_\_ Prices will decrease up to \_\_\_\_\_ % for the option period

\_\_\_\_\_ We do not offer an option

Cost increases shall be allowed only at the time option to renew is exercised.

If the University decides to exercise its right to renew the Contract, a revised price schedule will be included with the renewal. The revised price schedule will be based on the amounts stated herein and adjusted for any increase or decrease as provided in the options to renew.

11. Method or Rate of Billing: This section should list the format required for preparing the payment structure. If purchasing product, the structure would be each, per pound, per carton, etc. If soliciting a service, structure could be hourly, weekly, monthly, upon completion of project, etc. The payment structure must be precise in order to have consistency for ease in evaluating the Pricing Proposals from all Suppliers.

12. Travel Charges: Will the Department allow for travel expenses?

Yes                       No                       No Preference

13. Post Performance Review: Will the Department be performing a Post Performance Review? Note: Review is highly recommended if paying for services, and especially before any optional renewals.

Yes                       No                       No Preference

If yes, this section should indicate the University's plan for post performance review of the Supplier's performance in providing the required service. Indicate the criteria that relates to specific issues addressed in either the Request for Proposal or the Supplier's proposal.

14. The assigned Buyer will determine if a Bid Bond and Indemnity Bond/Performance Bond are required, but would like Department input. If it is determined a bond(s) is required, the Buyer will be contacting the Requesting Department to discuss the type of bond and the amounts (or percents) required.

15. Department must prepare a Pricing Proposal, which is a formal part of the Request for Proposal. This pricing structure should be precise in order to have consistency for ease in evaluating and comparing the Pricing Proposals from all Suppliers submitting a Proposal.

16. List members of the Evaluation Team for this Request for Proposal with telephone numbers and e-mail addresses. A minimum of three members is required. At least one member is recommended to be from a different department.