

Request for Proposal, Qualifications, and Bids 101

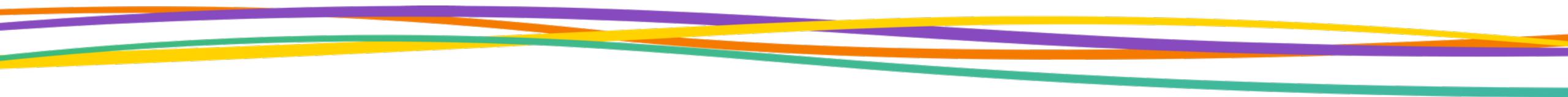


Why?



As a public agency, DRCOG is mandated to set forth and abide to a fair and transparent procurement process. This policy ensures procurements are:

- Equitable
- Cost effective
- Properly vetted
- Consistent
- Of the best quality and interest of DRCOG

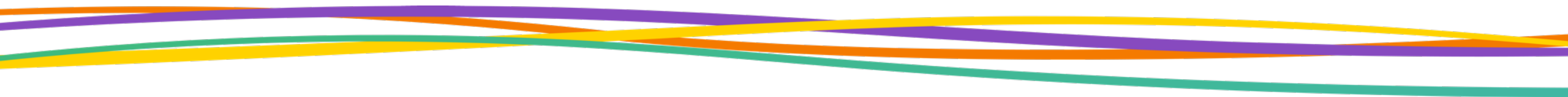


Thresholds



The amount of the service/contract dictates the process to follow:

Purchases up to \$5,000	➤	Approved PO
Purchases \$5,000 - \$50,000	➤	Three informal bids
Purchases \$50,000 and over	➤	RFP/Q/B
Purchases over \$75,000	➤	Finance & Budget Approval





When to use which process...



Informal Bids



Purchases between \$5,000 and \$50,000 require three informal bids and an approved purchase order. When submitting your purchase order in Acumatica include a justification memo that contains:

- ➔ The reason/need for the purchase
- ➔ The name of each vendor
- ➔ The amount of each vendor's bid
- ➔ Any other important selection criteria
- ➔ The chosen vendor and why

Sole Source Justification



In **rare** circumstances, a sole source justification may be made in lieu of receiving bids or publishing an RFP/Q/B. In this instance a strong case must be made that only one vendor (qualified source) can provide the specific service or product and holds the required experience or knowledge to accomplish the task consistent with the best interest of DRCOG.

Be advised that the larger the amount of the service/contract in play, the stronger the justification should be. To maintain the integrity of the DRCOG procurement process, sole source requests will be closely scrutinized.

Purchases over \$50,000



Purchases over \$50,000 require a competitive bid process. Depending on the service/contract required, one of three requests will be used:

Request for Proposal (RFP)

Request for Qualifications (RFQ)

Request for Bids (RFB)

Request for Proposal (RFP)



Used when there is a definite objective or product in mind, but the objective may be to look for a contractor to provide ideas as to how they envision approaching the task. It is typically a rather open-ended situation in which DRCOG is trying to tap the contractor's creativity or expertise to propose the approach that they feel would best satisfy DRCOG's objectives. DRCOG is not just trying to determine whether the contractor has the necessary experience and qualifications; DRCOG is also asking the contractor to propose the approach that they would recommend.

Request for Qualifications (RFQ)



Appropriate when DRCOG has a very specific task in mind with very specific required deliverables, a required timeframe, and a specific budget for the project. DRCOG is not looking for the contractor to develop their own ideas; DRCOG is merely asking whether the contractor has the experience and skills necessary to carry out DRCOG's requirements within the specified budget. DRCOG is not looking for contractors to prepare any proposals or to develop the campaign; DRCOG just wants the contractor to show how it is best qualified to perform the work.

Request for Bid (RFB)



This is similar to an RFQ in that DRCOG typically has a very specific objective in mind and is merely asking the contractor to provide information regarding how much it will cost to obtain the objective. RFBs will generally be used when DRCOG is looking for competitive bids for a specific tangible item or product such as a piece of equipment.





The RFP/Q/B Posting Process





Step One

To initiate the RFP/Q/B process, send an email to contracts@drcog.org stating your intent to publish an RFP/Q/B. At that time, the contracts team will contact you to set up a kick-off meeting to discuss the following:

- The project overview
- A rough RFP/Q/B timeline
- Justification memo requirements
- Scope of work requirements

They will also send you the Fiscal Management Control policy to familiarize you with the bid process. We encourage you to read through this prior to the kick-off meeting.

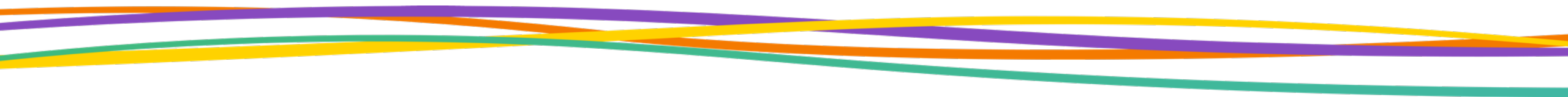
Step Two



The contracts team will send you a DocuSign link with the RFP/Q/B approval form. They will also *email* you the RFP/Q/B template in Word format. You will:

- Complete the RFP/Q/B approval form in DocuSign
- Attach a justification memo stating the need for the RFP/Q/B
- Attach the RFP/Q/B Word template with all necessary dates and any additional considerations to be made (such as project specific qualifications you want included)
- Attach a Word version of the Scope of Work
- Attach concurrence from granting authority (i.e. CDOT, CDHS, etc.) if necessary

The approval form and attachments will be forwarded by the contracts team through DocuSign to receive appropriate approvals.



Step Three



Once approved to proceed, the contracts team will work with you to refine the RFP/Q/B timeline and scope of work. This is a collaborative process and may require some back and forth as revisions are made.

Once the RFP/Q/B is finalized, the final documents will be routed through DocuSign for final approval.

Once approved, the RFP/B/Q is published to Bidnet. All communication with vendors up through the submittal of the proposal is handled through Bidnet. DRCOG staff is not to communicate with bidders directly or outside of Bidnet.



Let the Journey Begin



The RFP/Q/B Journey



There may be some variations to the RFP/Q/B schedule, but in most cases the entire process looks like this:

- RFP/Q/B is posted to Bidnet Direct
- Questions from bidders are received to bids@drcog.org; answers provided by the project manager are posted by the contracts team in 48 hours
- Submittals are received by stated due date and reviewed by DRCOG panel
- Panel scores the submittals independent of each other using criteria agreed upon by panel
- If necessary, panel selects approximately three submittals for interviews
- Interviews conducted and scored; panel votes on bidder
- Bidder is selected



What is next?

Once the bidder is selected, a justification memo is sent to the contracts team including:

- The RFP/Q/B project title
- The selection panel members
- The total respondents
- The respondents interviewed (if applicable)
- An overview of the scoring criteria and scores
- The selected bidder and why

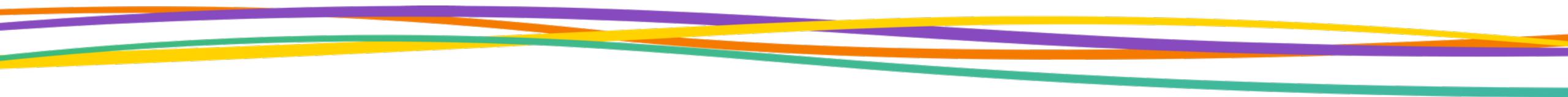
The contracts team will route through DocuSign for approval.

And then...



The contracts team will notify you when the selected bidder has been approved by senior staff.

If the service/contract is over \$75,000, the DRCOG Board Finance and Budget Committee must also grant approval to move forward. This committee meets the 3rd Wednesday of each month. See your director for details.



You are almost there...



With all approvals in place, you can notify the selected bidder that their submittal has been chosen and begin the contracting process.

You may also notify the other respondents in writing that their submittal was not accepted. When doing so:

- Do not indicate who was awarded the contract unless asked
- Only provide general feedback if asked
- Direct detailed inquiries to contracts@drcog.org to initiate the Colorado Open Records Act process

An acceptance and rejection letter template can be provided by the contracts team upon request. Acceptance letters may be sent pending Finance and Budget Committee approval (stating such), but never before Executive Director approval.



Resources

Where to find help...



Cognizance provides tools and information to help you understand and succeed in this process!

- The **Fiscal Management Control Policy** (policies and procedures tab) provides detailed information on all procurement processes, forms, and guidance related to any kind of purchase
- The **Resource Exchange** (resources tab) is an excellent source for justification memo examples, Finance and Budget Committee memos, and other helpful forms
- The **Contracts** page (resources tab) includes Statement of Work samples, RFP/Q/B checklist, and memo examples



Other things you should know...



Other things you should know...



- Bids should be posted for a minimum of two weeks
- Some grants require grant manager approval of the RFP/Q/B including the Scope of Work; this process can take up to two weeks
- A member of A&F must be on the review committee as an impartial participant and to ensure contract and insurance requirements can be met
- If you have external stakeholders on your review committee, you should allow for extra time
- Sample contracts are always included with the RFP/Q/B to avoid lengthy contract negotiations
- A sound Scope of Work with clear objectives, deliverables and timelines is essential to the timeliness of the RFP and contracting process; the timeline in the scope of work should match the contract term dates
- All RFP/Q/B materials, including scoring sheets are to be given to the contracts team upon completion for retention