



Stamford Public Schools
EXCELLENCE IS THE POINT.



BOE RFP/BID PROCESS

BOE FINANCE/PURCHASING DEPT

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Different Steps

Step 1

Drafting the document

- Request a RFP template and number from the Purchasing Assistant
- Requestor to write/define scope of services, RFP description, timeline, contract terms, scoring matrix, and determine a point of contact (POC) for the RFP
- Requestor to send the RFP document back to the Purchasing Dept along with a bidder's list that contains: name, address, email, phone, and fax of potential proposers.

Step 2

Issuing the RFP

- Purchasing Dept to publish the final document on the district website and advertise such document in the Advocate.
 - **Important: At this stage the final document may be distributed to a network of proposers (bidder's list, etc...)**
- Responses (proposals) from bidders must have a due date of **at least** ten (10) business days from the issuing date.

Step 3

Handling Vendor inquiries

- All vendor's inquiries must be sent to the POC **via email only** and SPS **has** to answer them promptly.
- All responses to vendor inquiries must be sent via **Addendum**, meaning the POC shall send all responses to the Purchasing Dept.
- The Purchasing Dept will then prepare an Addendum, send it to vendors in the bidder's list, and post it to the SPS website.
- SPS has no obligation to answer vendor's inquiries that are received **past** the due date as outlined in the RFP.



Different Steps – Cont'd



Step 4

Receiving/Reviewing Proposals

- All proposals are due by 2:30 pm on the RFP due date.
- The Purchasing Dept will open all proposals **only** at the due time/date.
- A summary sheet will be created by the Purchasing Assistant to be distributed to the POC
- One set of the original RFP responses will be kept by the Purchasing Dept. The remaining copies will be distributed to the POC
- The Purchasing Dept will also provide the POC with **1) Confidentially/Conflict of Interest Form; 2) Contract Recommendation Form**
- The POC has the responsibility to:
 - Form a selection committee;
 - Distribute copies of the proposals to each members of the committee (**odd number of members recommended**);
 - Please note: RFP for services anticipated to exceed \$100,000, a member of the Purchasing Dept **has** to be part of the committee (per Sec. 23-18-1 A.1.b.)
 - Have each committee member initial and sign the Confidentiality/Conflict of Interest Form prior to reviewing each proposal;
 - Allow and encourage each committee member to provide unbiased recommendations
 - Collect all scoring data and form (Confidentiality/Conflict of Interest Form completed by each member)
 - If committee members agree to conduct an interview process with the top proposers, plan accordingly.
 - Use another set of Scoring Sheets for each round of interview
 - Collect all new scoring data and new pricing info negotiated during the interview process
 - If a final recommendation is ready to be made, fill out the "Contract Recommendation Form" and return it to the BOE Purchasing Agent along with all documents collected above by the POC
 - **DO NOT COMMUNICATE WITH THE PROPOSERS AFTER THIS POINT. REFER THEM TO THE PURCHASING DEPT FOR ANY INQUIRIES THEY MAY HAVE ABOUT CONTRACT AWARD, FOIA, ETC.**

Step 5

Awarding the Contract

- The Purchasing Dept will send a "Conditional Award Notification" to the recommended proposer (s) requesting some additional documents, such as: 1) COI; 2) Corporate Resolution; 3) W9, and/or; 4) Any missing data from the initial proposal received.
- The Purchasing Dept will post the Conditional Award Notification at the SPS website at: <https://www.stamfordpublicschools.org/district/finance-purchasing/pages/rfp-contract-award-notification>

Different Steps – Cont'd



Step 6

Executing the Contract

- When all required documents are received and approved (COI by Risk Management), a formal contract shall be drafted.
- It's highly recommended for the POC and the Purchasing Agent to have the Law Dept involved in this phase of the RFP process.
- The POC should plan for a BOE Resolution if the contract amount is expected to exceed \$100,000 (for the entire contract term). The steps are:
 - Request a resolution template and a number from the Public Affairs' office
 - Add resolution and RFP documents to BOE Fiscal Committee Agenda for approval
 - After BOE Fiscal Committee's approval, package to be sent to full Board for approval
 - After full Board's approval, SPS and Proposer (s) shall enter into a final contract
- Once all remaining legal challenges, if any, are satisfactorily met by both parties (SPS and Proposer (s)), an executed contract will be added to the BOE Purchasing Dept Contract Database
- At this point, the POC may answer inquiries from any losing proposers. However, if such inquiries are in the form of a FOIA, please send them to the BOE Dir. of Finance and the BOE Purchasing Agent.
- Per the CT Student Data Privacy Law, starting July 1st of 2018, most contracts, if not all, shall be loaded to the District Website.

Step 7

Creating A Purchase Order

- The POC shall work with the Purchasing Dept to determine annual contract amount that needs to be entered into our accounting system (HTE).
- A PO will be created for the annual contract amount by the Purchasing Dept.
- The Awarded Proposer (s) shall not ship any good (services) without a PO.
- For help creating a requisition into our accounting system (HTE), which will turn into a PO, please contact Jeanie Valentine at jvalentine@stamfordct.gov or 203-977-4243

