Stamford Public Schools
EXCELLENCE IS THE POINT.

RFP/BID PROCESS

BOE FINANCE/PURCHASING DEPARTMENT

Step 1 – Drafting the solicitation document

- Point of Contact ("**POC**," "Requestor") to request the **Scope of Service (SOS**) template from the **SPS Purchasing Agent**.
- **POC** to complete such SOS with the appropriate/complete scope of what a supplier/vendor/consultant is expected to provide as goods or services to the district. In essence, requestor needs to provide: detail scope, timeline, and contract terms in the template provided by the **SPS Purchasing Agent**.
- **POC** to provide a bidder's list with names, emails, and possibly phone numbers in the SOS template.
- **POC** to provide the names of potential members of the Collaboration Team.

Since SPS is conducting its RFP/Bid solicitation process online through our Oracle Procurement Sourcing Application, willing participants (vendors) are required to be registered suppliers with a valid email address. Suppliers that are not yet in our Oracle system can only participate once registered. A job-aid and a link are available to assist them in registering.

Step 2 – Issuing the RFP/Bid solicitation

- SPS Purchasing Dept to publish the final RFP solicitation document on the Oracle Sourcing Portal (Oracle Abstracts). A link to access such website is on the district website. The RFP/Bid solicitation is also advertised in the local newspaper (s).
- Per our purchasing ordinance, RFP/Bid solicitations **must stay published/opened for at least 10 business days**.

Step 3 - Handling Vendor's inquiries

- All vendor's inquiries must be sent to the **POC'**s email address by the Q&A deadline date at 1:00 pm.

- All responses to vendor inquiries must be sent via **Addendum**, meaning the **POC** shall send responses to all questions to the **SPS Purchasing Agent**.
- **Addendum** will then be posted online via the Oracle Procurement Sourcing Application.
- The SPS has no obligation to answer vendor's inquiries that are received past the due date as outlined in the RFP solicitation.

Step 4 – Receiving/Reviewing Proposal ----------

- All proposals are due by 2:30 pm online on the solicitation due date.
- The system automatically closes the RFP Portal on the exact due date and time. The **SPS Purchasing Agent** then opens the RFP solicitation for Scoring.
- A Collaboration Team (committee), composed of the **POC** and other individuals will receive a notification that RFP Solicitation.20XX.XXXX is open for scoring.
- RFP solicitation for services anticipated to exceed $100,000, a member of the SPS Purchasing Dept **must** be part of the Collaboration Team (per Sec. 23-18-1 A.1.b)
- To start the review process, the **SPS Purchasing Agent** downloads all vendor's responses and share them via a Google Drive with members of the Collaboration Team.
- It's recommended the **POC** allow and encourage Collaboration Team members to provide unbiased scores.
- The Collaboration Team's role is to:
    - Confirm to the SPS's Purchasing Department there's no Conflict of Interest prior to reviewing each proposal.
    - Review each supplier's response thoroughly.
    - Score each supplier's response
- If the Collaboration Team agrees to conduct an interview process with the top proposers, plan accordingly.
- Conduct the 1st set of interviews, then make the appropriate top selection for additional interviews, if necessary.
- Document the rationale for selection for top proposers.
- Once all interviews are completed, Collaboration Team members can log into Oracle to score each proposer, including the bottom ones. For instance, in the final scoring, a bottom proposer may receive 1 out of 10 for experience, while a top proposer may receive 9 out of 10, etc.
- After all interviews, if any, the **POC** will receive the Scoring Summary from the **SPS Purchasing Agent**. The Scoring Summary is the average/aggregate score from all Collaboration Team members. It's the basis for contract/award recommendation.

- Based on the Scoring Summary, the **POC** will be asked to confirm to the **SPS Purchasing Agent** which supplier (s) to send a Conditional Award Notification to.
- Once an award recommendation is made, **PLEASE DO NOT COMMUNICATE WITH OTHER PROPOSERS. REFER THEM TO THE SPS PURCHASING DEPARTMENT FOR ANY INQUIRIES THEY HAVE ABOUT CONTRACT AWARD, FOIA, ETC**. There's a State of CT statute that states we're not obligated to answer questions until a contract is executed.

Step 5 – Executing the Contract ----------

- In the Conditional Award Letter, a request for a Certificate of Insurance is made.
- The **SPS Purchasing Agent** will provide a compilation of all response documents required for the drafting of a formal contract.
- Once all the documents are in place:
    - The **SPS Purchasing Agent** or the **POC** will provide a Certificate of Insurance to be reviewed/approved by Risk Management.
    - The **POC** will contact the Law Department so they can assign a Lawyer to draft/review a contract document.
    - The **POC** should plan for a Board Resolution to be prepared by the **SPS Chief Financial Officer** if the contract amount exceeds $100,000 annually. This board requirement is for RFP, not Bid.
    - Assuming all parties have negotiated and completed a contract, such executed contract shall be sent back to the **SPS Purchasing Agent** to store into the SPS Contract Database and in Oracle Procurement Agreements.
    - Per the CT Data Privacy Law, Starting July 1st of 2018, most contracts, if not all, shall be loaded to the district website.
- With a contract executed, a **Purchase Order** can be created for the annual amount due to the winning proposer.