

## **Excerpt from Purchasing Manual:**

### **REQUEST FOR PROPOSALS (RFP)**

A Request for Proposal (RFP) is a solicitation whose associated award evaluation and vendor selection process is predicated on a best value evaluation, rather than strictly upon award to the lowest priced responsive and responsible bidder. This type of evaluation is a sensitive and involved process. Detailed guidelines have been developed to ensure such evaluations are conducted in an appropriate, fair and accurate manner. The following section provides an overview of those procedures to enable departments to prepare for, and participate in, negotiated procurements in conjunction with the Purchasing and Contracts Division.

### **FORMATION AND PERFORMANCE OF EVALUATION/SELECTION COMMITTEES**

The Purchasing and Contracts representative is responsible for the initial review of all proposals for responsiveness before distributing them to the Evaluation Committee. A proposer is considered responsive if the proposal conforms in all material respects to the terms and conditions in the solicitation.

### **SELECTION COMMITTEE TEAM MEMBERS**

The Project Manager or lead for the solicitation, along with the Purchasing representative for the solicitation will determine the number and makeup of the Selection Committee.

It is recommended to have a minimum of 3 and maximum of 5 evaluation team members for each solicitation.

- a. Each member must have no personal or financial interest in any vendor or firm which has submitted a proposal to the City.
- b. Each member must have a professional interest that the recommendations of the Committee can be supported and defended legally and ethically.
- c. Each member must have a professional interest that the recommendations of the Committee will lead to the selection of a vendor which will provide goods or services that is the best value for the City.

The Purchasing and Contracts representative shall serve as the Selection Committee Chairperson in order to facilitate the evaluation, but shall not be a voting member of the selection committee.

### **INITIAL MEETING OF THE SELECTION COMMITTEE**

The Purchasing and Contracts representative, shall conduct an initial meeting (Kick-Off Meeting) with the Selection Committee to ensure that each member has a clear understanding of their duties and responsibilities in the selection process. A copy of these guidelines, the solicitation, any addenda, each proposer's submittal, and a copy of the evaluation criteria will be distributed to Committee members.

### **CONFLICT OF INTEREST**

Once proposals have been received and it is known which proposers are involved in the competition, each member of the Evaluation Committee will be asked if they have a personal or financial interest in any proposer, and if the member understands and can perform impartially within the Evaluation Committee guidelines. A Non-Conflict of Interest/Non-Disclosure Statement must be signed by each Committee member prior to the distribution and commencement of the evaluation of the proposals. If a conflict of interest exists or appears to exist, that member will be asked to disclose such conflict in writing. The Purchasing representative shall evaluate all potential conflicts of interest and determine whether or not to disqualify the Committee member based on the information provided.

## **COMMITTEE RULES AND PROCEDURES**

All evaluators on the Evaluation Committee are required to apply sound and unbiased judgment in awarding points to the proposals for the purpose of ranking them.

It is very important that all Selection Committee members read each solicitation thoroughly and have a clear understanding of the requirements and evaluation criteria before attempting to evaluate the proposals. All questions should be directed to the Purchasing and Contracts representative.

The Evaluation Committee must read and agree to the guidelines and rules provided for evaluation of each proposal. Generally, these consist of the following:

- a. Evaluation Committee proceedings are confidential and should not be discussed outside of the meetings. If a member of City leadership requests a member of the evaluation team to divulge information regarding proposals received, they must inform Purchasing before taking any action or discussing the proposals with anyone outside of the evaluation team meetings.
- b. After receipt of proposals, each Committee member must review and evaluate the proposals independently, without discussing their evaluation with other Committee members or City staff.
- c. The evaluation criteria in the RFP are the only criteria that may be used to evaluate the proposals, and the vendors' offers must be evaluated solely on the contents of their proposals. All criteria must be scored.
- d. Prior to the Evaluation Committee meeting, any questions, clarifications, or additional information requested from a proposer by a member must be submitted in writing through the Purchasing and Contracts Division.
- e. Score sheets must be completed prior to the Committee meeting where rankings will be determined. After the Evaluation Committee members have independently completed the initial review and scoring of all proposals, the Committee will convene to openly discuss the proposals. Members may adjust their initial scoring based on their interpretation of any additional information gained from the Committee's discussions. After all discussions have been completed, each Committee member shall finalize their scores.
- f. Score sheets will be tabulated and ranked from the highest to the lowest by the Purchasing representative.
- g. Depending on the outcome of the scoring, the Committee will recommend one of the following:
  1. Award the contract to the highest ranked proposer; or
  2. Short-list the top ranked proposers and request scheduling of presentations
- h. If the Committee recommends awarding the contract to the highest ranked proposal, no further action is required by the Evaluation Committee.

i. If presentations are requested, the Evaluation Committee shall identify which proposers will be asked to provide presentations.

j. All proposers selected for presentations will be notified in writing of the meeting by the Procurement Specialist, identifying the date, time, location, with a uniform script listing the specific questions or information requested by the Evaluation Committee to be addressed at the presentation.

k. Prior to the presentations, the Procurement Specialist will provide the evaluation criteria and score sheets to the Evaluation Committee.

l. During the presentations, Committee members will be able to ask questions of the proposers for a clear understanding of each proposer's position.

m. After presentations are completed, the Committee will have the opportunity to continue discussions among themselves. After discussions are completed, each member shall score the presentations based on the information presented. Score sheets will be tabulated and added to the pre-interview scores by the Procurement Specialist. The award recommendation will be for the proposer with the highest ranked combined score.

n. The Project Manager shall work with the Purchasing and Contracts Division on a summary of award recommendation.

### **NEGOTIATIONS**

The Purchasing representative shall manage the negotiation process for all City procurement projects. However, this shall not preclude the use of consultants or legal assistance in developing negotiation strategy and conducting negotiations and discussions with vendors. In general, negotiations shall be conducted under the principle of win-win, where the City and vendor share benefits from the process and subsequent contracts.

All negotiations shall follow the requirements of Colorado Statutes, and must be conducted with the highest ethical standards, fairness and equity; and with the understanding that the City shall not be placed in an unfair or unreasonable position to the vendor's.