

# Auburn University RFP Process Guidelines

## **Purpose of an RFP (Request for Proposal):**

A request for proposal, or RFP, is a tool that can help ensure Auburn procures the most competitively priced goods and services we need to operate our business. The RFP process can be as simple or as complex as necessary to ensure potential suppliers and vendors understand exactly what you are in the market for.

When you write an RFP, it allows you to outline the specific product or service you are in the market to procure. The RFP is simultaneously distributed to qualified vendors for bid. Using this approach, you can detail everything from the type of services, the frequency of needs, your budget allocation, and the length of the contract terms.

## **RFP Process:**

- 1) AU department that needs to procure the good or service should prepare a DRAFT RFP and send to PBS for review. PBS does have a standardized template, so you may reach out to our staff to collect that document.
- 2) PBS staff will review and make any necessary revisions and send the DRAFT back to the department for review.
- 3) Once a final RFP document is completed, PBS will issue the RFP and potential vendors will be notified via our bid module. Additionally, an electronic copy of the RFP will be posted to the PBS bid calendar at [aub.ie/bids](http://aub.ie/bids) for public notice.
- 4) Once the proposals are posted, the vendors will have a chance to submit questions to PBS and applicable addendums will be issued by PBS.
- 5) Proposals will be opened publicly on the assigned date
- 6) Proposals will be sent to the AU department or selection committee for review
- 7) If needed, finalist presentations will be scheduled by PBS.
- 8) Vendor will be selected and final contract will be executed.

**Key Sections of an RFP:** Though PBS will guide the overall RFP process, we need your expertise to define exactly what product or service is needed and the expectations

you have of the vendor. Each of the following sections should be included in the DRAFT RFP sent to PBS.

### **1.1 Statement of Purpose**

Describe the extent of goods and/or services you're looking for, as well, as the overall objectives of the contract. See example below.

Auburn University is seeking to establish a preferred relationship with an office products supplier in which a system (electronic commerce) will be put in place to allow a University employee (user) to go on-line to make purchases. The awarded Supplier(s) will establish prices and/or discounts and create catalogs on-line. A user may then go to the catalog, enter an appropriate password/ID, the server would recognize the employee is an Auburn University employee and automatically show the established pricing and/or discount schedule. The employee could then search for items wanted, "point and click" and the order is placed. The employee will pay the supplier on-line, using their AU Visa Purchasing Card.

### **1.2 Background Information**

Provide a brief overview of your department and its operations, using statistics, customer demographics, etc. Include current volume and/or spend data if this is an existing product or service that campus is using. PBS will include an overview of Auburn University as a whole. See example below.

PBS will include - Auburn University is a land grant university. The University has two campuses, Auburn and Montgomery, with a combined enrollment of 30,969 students for Fall Semester 2014. It serves the State of Alabama, the nation and international business communities through instruction of students and the advancement of research and outreach programs.

Department should include - The University has a robust purchasing card program with spend during fiscal year 2013 of \$33,713.629.21 with 130,516 transactions. There are over 2,900 cards in circulation, which are university liability cards.

### **1.3 Scope of Work**

Describe the specific duties to be performed by the vendor and the expected outcomes. Include a detailed listing of responsibilities of the vendor. By clearly defining Auburn's needs and expectations, the vendors can provide better proposals.

### **1.4 Outcome and Performance Standards**

Specify the outcome targets, minimal performance standards expected from the vendor, and methods for monitoring performance and process for implementing corrective actions. Include any reporting requirements and guidelines for business reviews if applicable.

## **1.5 Deliverables**

Include any delivery requirements or service deliverables. See example below.

The Contractor shall provide Next Day Desktop Delivery at no extra charge. On-time delivery shall be maintained at 95% or greater. On-time delivery is defined as next day desktop delivery of order within one (1) business day of placement of order. Later orders are anything greater than one (1) day, unless with approved notification.

## **1.6 Term of Contract**

Specify length, proposed start date and end date of the contract, and the options for renewal. PBS can provide guidance regarding industry standard and/or good business practice. See example below.

The University proposes the initial term of the agreement for office supplies and paper shall be three (3) years, with two (2) one-year renewal options, with the consent of both parties. The toner portion of the contract will become effective on November 1, 2009 and will assume the same contract expiration dates as office supplies and paper.

## **1.7 Payments and Penalties**

List all the terms of payment. Include any penalties for inadequate performance or lack of compliance.

## **1.8 Contractual Terms and Conditions**

Auburn's general terms and conditions will be included by PBS. However, it is the department's responsibility to check with Risk Management and Safety for any applicable insurance requirements and OIT for any applicable data security requirements.

## **1.9 Requirements for Proposal Preparation**

Specify any submittal requirements and provide a list of all documents that must be included in the responses.

## **1.10 Evaluation and Award Process**

Include the procedures and criteria that will be used to evaluate the proposals and make the final award. **Note: The State of Alabama requires that pricing must be evaluated at 50% or greater.** See example below.

The University shall determine the award after evaluating each response on the following points. For the basis of award, each of the points will be considered in the listed order:

Financial Considerations: 50%

Customer Service & Technical Support: 20%

Technical Capabilities & Requirements: 15%

Program Implementation & Training: 15%

### 1.11 Timeline & Schedule

Clearly present the timeline for the steps leading to the final award decision, such as the dates of pre-proposal meetings, question submittals, proposal opening date, finalists' presentations, and contract negotiations. See example below.

Task	Date
RFP Bid Issued	_____
Deadline for Questions	_____
RFP Bid Opening	_____
Finalists Presentations	_____
Contract Negotiations & Executed Contract	_____