

DOCUMENTS REQUIRED FROM AGENCY FOR A REQUEST FOR PROPOSAL (RFP)

Request for Proposal: A purchasing method that is used for professional services in excess of \$250,000.

The information below is a checklist of agency responsibilities in processing a Request for Proposal (RFP). Please note that while this information is accurate in most cases, there may be occasion where additional information may be necessary or required.

CHECKLIST FOR RFP

✓	DESCRIPTION
	Solicitation
	Agency Written Request to use the RFP process. If approved, follow steps below.
	*WV-35 Purchase Requisition or RQH Screen (TEAM) signed by agency (with estimated value and maximum budget amounts). Note the previous contract number and expiration date on the WV-35, if applicable.
	Provide List of Evaluation Committee Members with the WV-35 to the Purchasing Division.
	**WVFIMS Agency Cover Sheet (P-Document) . Not applicable for open-end contracts.
	Standard RFP Form Template Completed including evaluation point criteria and cost bid form.
	Suggested Vendor List for at least three vendors (name, address, fax number and email, if available).
	Pre-approvals , when applicable (such as Attorney General, Chief Technology Officer/IS&C, Design Build Board, Capitol Building Commission, WV Association of Rehabilitation Facilities, Surplus Property, Statewide Interoperability Executive Committee)
	Bid Process
	Mandatory Pre-bid Attendee List , if applicable.
	Addendums , if applicable. (Information prepared by agency for processing by Purchasing Division).
	Award Process
	RFP Evaluation Committee Member Training Certification prior to evaluation.
	Agency Technical Evaluation Signed by Committee Members (must include agency procurement officer).
	Purchasing Division Approves Technical Evaluation and Establishes Cost Bid Opening.
	Cost Bid Evaluation Signed by Committee Members and Signed Agency Recommendation for Award is Submitted to Purchasing Division (with disqualifications and those meeting requirements).
	Amended P-Document
	Purchasing Affidavit signed and dated by successful vendor (may be provided through bid process).
	Verification of Vendor Properly Registered with the Purchasing Division
	Verification of Vendor in Good Standing (with all laws and requirements of the state, including Secretary of State, Insurance Commission, and Workers Compensation).
	Certification of Non-Conflict of Interest (signed by Agency Procurement Officer and other appropriate staff).
	WV-96 Agreement Addendum (or WV-96A for Software) signed by vendor and agency, if applicable.
	Purchasing Division obtains bonds and insurance, if applicable.

*Maximum budget amounts must be reflected on the WV-35 Purchase Requisition to allow for price negotiations as authorized and described in *West Virginia Code* §5A-3-11a and *Code of State Rules* 148-1-7, 7.11.

**Projects that are funded by sources whereby invoices will not be processed by the State Auditor's Office do not require a P-Document. However, in those cases, the funding sources must be named on the WV-35 Purchase Requisition to be carried forward on the purchase order.